WinTOTAL Aurora

User's Guide

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WINTOTAL USER'S GUIDE 5

USING THIS GUIDE 5
CONVENTIONS IN THIS GUIDE 5
END USER LICENSE AGREEMENTS 6
WinTOTAL – Aurora Software License ("License") by a la mode, inc. 7
Adobe Systems Incorporated 11
Flood Data 12
Apex License Agreement 13
Appraisal Institute 13
SYSTEM REQUIREMENTS 14
INSTALL WINTOTAL 15
CONFIGURE YOUR FIREWALL 16

CONFIGURE WINTOTAL 16

GENERAL SETTINGS 17
Manage User Accounts 18
Create User Accounts 19
Set Up Your Signature 19
Set the Current User 20
Change Database Locations 20
File Cabinet Settings 20
FORMFILLING PREFERENCES 21
Data Entry Options 22
Fonts & Form Colors 24
Spell Check Options 26
IMAGE SETTINGS 26
Image Quality Settings 26
Create Photo Labels 27
Comp Photo Import Settings 27
POCKET TOTAL SETUP 28
SYNCHRONIZATION OPTIONS 28
SET UP YOUR CONNECTION 28
Set Up High Speed Connections 29
Set Up Dial-up Connections 30
Schedule Automatic Updates 31
SET UP YOUR SKETCHER 31
Register Apex 32
UnRegister Apex 33
Sketch Options 34
ENABLE FLOOD MAPS 34
GEOCODE COMPS 34
INTEGRATE WITH XSITES 35
HOVERLINKS 37
WinTOTAL HoverLinks 37
HoverLinks to Websites 38
HoverLinks to Programs 38
CUSTOMIZE YOUR TOOLBARS 39
Toggle Custom Toolbars 39
Appraisal Desktop Toolbars 39
WinTOTAL Toolbars 40
REGISTER WINTOTAL 40
SET UP YOUR OFFICE 41
AUTOMATE WINTOTAL 42
Schedule Vault & Exact Backups 42
Schedule XSite Synchronization 42
Schedule DirectFax Synchronization 43
Schedule File Cleanup 43

APPRAISAL DESKTOP 44

REPORT MANAGEMENT 45
Login Manager 45
Organize Reports 46
Create Folders 47
Edit Your Column Layout 47
Attach External Folders 48
Tracking Folders 49
Set Up Tracking Rules 49
Rebuild Your Reports List 50
Work with Reports 51
Search for Reports 52
Clone Reports 54
Print Reports 54
Set Report Status 55
Send Reports to Vault 56
Report Views 56
Detailed View 56
Order Form View 57
Workfile View 58
DirectFax View 59
E&O View 60
History View 60
SYNCHRONIZE WINTOTAL 61

Contacts 63
Find Contacts *64*
Create Individual Contacts *65*
Create Company Contacts *66*
Manage Existing Contacts *67*
Merge Duplicate Contacts *67*
Create Client Login Accounts *68*
Ad-hoc Contacts *69*
Synchronize Contacts *70*
Import Athena Contacts *70*
Pocket TOTAL 71
SnapShot 71
WinTOTAL Dashboard 72
Get Help 72
Market to Past Clients 73

ORDER POWERVIEW 74

Set Up Order Preferences 75
Change Start Points for Directions *76*
Automate Order Numbering *76*
Complete the Order Form *77*
Get Flood & Census Data *78*
Set Internal Status 79
Merge in Report Data 80
Add Forms to Reports 81

FORMS POWERVIEW 82

Navigate Forms 83
Control Your View 83
Formfilling Shortcuts 84
QuickLists 85
Create Line Item QuickLists *85*
Create Multi-field QuickLists *85*
Use QuickLists *86*
Organize QuickLists *87*
Share QuickLists *88*
QuickLists Options *89*
Recent Responses 89
Edit Recent Responses *90*
Use Recent Responses *90*
Swap Recent Responses & QuickLists *91*
QuickNotes 91
Default Data & Formatting 92
Set Default Fonts *92*
Save Custom Formatting *92*
Set Default Data *93*
Field-specific Formatting 93
Add Documents to Reports 94
Write Addenda 97
Create Addenda *97*
Create Tables & Columns *97*
Cell Attributes 98
Table Attributes 99
Insert Images *99*
Link to Form Fields *100*
Navigate Addenda *101*
Save Addenda *101*
Use Existing Addenda *102*
Text Overflow Options *102*
Worksheet Calculations 104
Create Worksheets *104*
Link Fields *104*
Enter Formulas *105*
Format Worksheets *106*
Save Worksheets *106*
Use Existing Worksheets *106*
Check E&O 107
Other Formfilling Tools 107
Sign Reports 108

COMPS POWERVIEW 109

Add Comps 109
Remove Comps 110
Arrange Comps 110
Map Comps 111
Comps Detailed View 111
Fill Out Comp Columns 112
Automatically Adjust 112

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Comps Database ... 114
Import Comps ... 115
Enter Comps Manually ... 115
Import Comps from Old Reports ... 116
Import Comps from Open Reports ... 116
Import Comps from Data Sources ... 117
Search for Comps ... 120
Map Comps ... 121
View Database Comps ... 122
Insert Database Comps ... 123

IMAGES POWERVIEW ... 123

Work with Image Pages ... 123
Download Photos ... 124
Auto Retrieval Wizard ... 124
QuickPix ... 126
QuickPix Configuration ... 127
Use QuickPix ... 127
Customize QuickPix ... 128
Images Database ... 130
Search for Images ... 130
Unused Database Images ... 131
My Albums ... 131
Photo Pop-up Window ... 132
Scan Images ... 132
Images on Disk ... 133
Edit Image Forms ... 133
Place Photos ... 134
Edit Images ... 134
Optimize Images ... 135
Enhance Images ... 136
Annotate Images ... 137

SKETCH POWERVIEW ... 138

Choose Your Sketcher ... 139
Sketch Areas ... 139
Import Old Sketches ... 139
Create Sketches ... 140

MAPS POWERVIEW ... 141

Set Up Map Preferences ... 141
Get Maps ... 142
Verify Address/GPS Data ... 143
Retrieve a Location Map ... 144
Retrieve Flood & Census Data ... 145
Retrieve a Flood Map ... 146
Edit Maps ... 146
Balloons ... 147
Lines ... 147
Highlight ... 148
Icons ... 148
Report Transfer Options ... 149
Work with Maps ... 150
Add Maps Manually ... 151

WORKFILE POWERVIEW ... 151

Add Files ... 152
Manage Files ... 152
DirectFax ... 153
Send Reports to Vault ... 154

TOOLS ... 155

Spell Check ... 155
Change Case ... 156
Calendar ... 156
File Labels ... 156
Copyright Reports ... 158
Area Calculator ... 159
Area Estimator ... 159
Square Footage Adjuster ... 160
Math Calculator ... 160
Marshall & Swift Cost Estimates ... 161
Property Presentations ... 163
Creating the Presentation ... 164
Publishing the Presentation ... 165
Convert Competitor Files ... 165

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Collaboration 166
Associate XSite Orders 167
Roll Back to Athena 167

PRINTING 168

Print Reports 168
Print Options 169
Print Net & Gross Adjustments 171
Print Summary Phrases 171
Remove Pages from the TOC 172
PDF Options & Security 172
Edit PDF Adjustments 173
Edit PDF Security Settings 173
Edit Advanced PDF Settings 174

REPORT DELIVERY 175

Default Delivery Methods 175
Message Templates 175
Select E-mail Recipients 176
TOTAL Connect Pro Pre-Delivery Check 177
VSS Pre–Delivery Check 178
E-mail Delivery 181
Share WinTOTAL PDF Reports 181
Share WinTOTAL Reports 182
Review Sent Reports 183
Receive WinTOTAL Reports 183
Deliver with TOTAL Connect 184

BILLING & BUSINESS MANAGEMENT 184

Configure XSites Billing 185
Defining User Roles 186
Setting Up Your Product List 186
Creating Client Specific Fee Lists 187
Assigning Client Fee Lists 188
Setting Up Your Coverage Area 189
Setting Up Your Fee Splits 189
Assigning Your Fee Splits 190
Setting Up Billing Preferences 191
Configure WinTOTAL Billing 192
Use XSites Billing 192
Dashboard 192
Work with XSite Orders 194
Create XSite Orders 195
Edit XSite Orders 195
Create Client Accounts 196
Change XSite Order Status 197
Invoicing 198
Creating Order Invoices 198
Creating Miscellaneous Invoices 200
Deliver XSite Invoices 200
Canceling Invoices 200
Customizing the Invoice Grid 200
Payments 201
Recording Full Payments 201
Recording Partial Payments 202
Recording Balloon Payments 202
Charging Credit Cards for Orders 203
Paying Employees 203
Accounting 204
Reporting 204
Use WinTOTAL Billing 207
Work with Orders 207
Create Orders 208
Create Client Login Accounts 209
Update Internal Order Status 209
Payments & Invoicing 210
Create Invoices 210
Delivering Invoices 211
Mark Reports as Paid 212
Record Partial Client Payments 212
QuickBooks Integration 213
Set Up QuickBooks Integration 213
Export Reports to QuickBooks 214
Track Exported Reports 215

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WinTOTAL User's Guide

This fully-searchable help file is provided to give you a clear overview of working with WinTOTAL. Use the links on the left to explore the various functions of WinTOTAL. Click **Search** to find information on a particular topic or feature.

In addition to this user's guide, you might also want to consult the additional resources in the Help PowerView of the Appraisal Desktop. The additional help includes the following WinTOTAL resources:

- **QuickStart Guide**: A brief tour through WinTOTAL.
- **Networking Guide**: A guide to installing WinTOTAL on a network.
- **Video Library**: A complete series of online tutorials.
- **Webinars:** An exhaustive list of web-based training.
- And more…

Visit www.alamode.com/Appraiser/Support for access to our full list of help resources.

Using this Guide

We hope this on-screen help file provides a good reference as you begin using WinTOTAL. Here's a short guide to help you make the most use of this tool and how to navigate through it.

Contents

The Table of Contents allows you to navigate through the chapters of the manual. Each blue arrow (▸) represents one chapter. By clicking a blue arrow icon (▸) , you can see the topics within that chapter. Just click a topic or chapter name to view it in the right-hand pane.

Many pages contain both text and photos. In addition, some of the text will be blue **Error! Hyperlink reference not valid.**. This "blue" text is called a hyperlink. When you click on it, you'll be taken to another webpage or another section of the manual which further explains or illustrates a topic.

Search

The **Search** feature provides full-text search capabilities for this guide. From here, just enter the words you want to find within topics and click **Go** to view a list of all pages containing your search criteria. Again, to view the desired pages, simply click on them and they'll appear in the pane on the right.

Search is particularly useful when you want to find a section of the help file that is unique, but you're not sure where it is in the Table of Contents, or when you want to find all instances of a word within the help file.

Conventions in this Guide

Before we get started, let's cover a few of the conventions used in throughout this guide to describe the processes you'll use as you work in WinTOTAL Aurora.

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- **Click, double-click and right-click -** Most items are activated with a single click. If a double-click is necessary, this guide will tell you. To right-click, use the button on the right side of your mouse.
- **Menus -** Menus are at the top of the window throughout WinTOTAL. They are labeled "File," "Tools," etc. to provide a general indication of what each menu contains.
- **PowerView -** Functions in WinTOTAL are arranged in screens called "PowerViews." When a report is open, you'll notice buttons at the top labeled "Order," "Form," "Comps," etc. to indicate which functions each of these PowerViews contain. Simply click any of these buttons to switch PowerViews and address the corresponding sections of your report.
- **PowerPanes -** In every PowerView, you'll find a sub-menu of options located on the lower-left side of the screen. This PowerPane takes you quickly to the sub-functions applicable to the current PowerView. For example, in the Comps PowerView is a Comps PowerPane, allowing you to switch between your Comps database and the Side-by-Side view of your comps grid.
- **Select -** When this guide tells you to select something, it means to click it once. Often, an item that has been selected appears to be highlighted to indicate that you have selected it.
- **Window/Dialog -** Throughout this guide, we'll use the terms "window" and "dialog" when referring to the active screen.
- **Tabs -** Some windows within WinTOTAL have "tabs" to help you navigate through the content in the window. Tabs are effectively the same in WinTOTAL as tabs you may find on manila folders you'd use to file physical copies of important documents. You'll notice these throughout WinTOTAL, particularly as you fill out your forms.
- **Links, URLs, web addresses, and hyperlinks -** Each of these items refer to nearly the same thing. Links and hyperlinks are actually just words that you can click to "link" to another program, website, or other content. Typically, these "links" are indicated by their appearance as they are often blue and underlined. "Web addresses" and "URLs" refer to the address connected to the hyperlink. For instance, a link to our Video Library, would take you to the "web address" or "URL" of http://www.alamode.com/wintotal/videos.
- **Fields -** Fields are any places in WinTOTAL – whether in a form or in a dialog box - where you can type information.
- **Drop-down lists -** Often, fields in a WinTOTAL form or dialog box will have an arrow displayed on the right side of them. By clicking the arrow, you can access a picklist of items. You can also use the Alt+Down Arrow keyboard shortcut to open these lists.
- **Pop-up Lists -** Similar to Drop-down lists, only they will appear either above or below the link you click, depending upon where they appear on your screen.

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System Requirements

a la mode's products are designed to run on Windows (either 32-bit or 64-bit versions). As such, your PC needs to meet the requirements laid out by Microsoft for the version of Windows that you're using. However, as with any software, the more it exceeds the minimum requirements, the better your experience will be.

Beyond the official requirements to run Windows, one thing to keep in mind when purchasing a new PC or upgrading your existing hardware is hard drive space. You'll need to make sure you have enough to install the programs you need to work and store your reports, too. When it comes to storage space (like all computer specs), more is always better.

Here are some details about our products that will help you choose a PC with an appropriate amount of storage:

Program size on disk:

- **WinTOTAL Aurora:** 1GB (server and standalone)
- **TOTAL Sketch:** 200MB
- **TOTAL Connect:** 220MB
- 1024 MB = 1 GB || 1024 GB = 1 TB

The above sizes don't include the size of the install file, which can be around the same size as the program itself. Keep this in mind if you're downloading the install files on a slow or limited Internet connection.

Report file sizes:
Since appraisal files continue to grow, we recommend that you have at least **10MB** of storage space available per report that you complete.

Use this to estimate the amount of storage you need by multiplying this value with the number of reports you complete in a year, then multiple that value by two (WinTOTAL and TOTAL keep a local backup of every file on disk) to determine your annual ongoing storage needs.

Choose a supported version of Windows below to view Microsoft's official minimum system requirements. If you're unsure which version of Windows you use, click here for a Microsoft support page that will tell you.

Windows Vista Windows 7 Windows 8/8.1

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Install WinTOTAL

The first step, of course, is to install WinTOTAL. Here's how:

Note: As with most Windows software, administrative rights are required to install WinTOTAL. If you don't have administrative rights, contact your system administrator.

Install from the Internet

1. First, you need to download the latest WinTOTAL installation file from our website. To do so, visit the **My Downloads** section of your account at http://www.alamode.com/myaccount. Just log in with your a la mode username and password.
2. Once the file download is complete, run the installation file, provide a preferred temporary directory for WinTOTAL to place its installation files and then click **Install**.

   Note: Unless you have a specific reason to change the temporary directory, we recommend that you leave the temporary directory as the default value.

3. An installer will appear and prompt you about what you want to do, click **Install WinTOTAL**. Then, follow through the installation wizard. If the wizard prompts you about whether you want to install Microsoft's SQL Database engine, click **Yes.**
4. Along the way, youï¿½ll need to agree to our End User License Agreement and you may need to supply WinTOTAL with your preferred installation directory.
5. When the installation is finished, start WinTOTAL via your **Start** menu.

Install WinTOTAL on a Network

When youï¿½ve got multiple computers in your office, using WinTOTAL on a network benefits you by centralizing your data as well as program updates and administration while also allowing each user to have custom preferences and permissions to crucial data.

The latest version of WinTOTAL, Aurora, goes even further for network users by implementing Microsoft SQL databases for faster and more reliable searches and file listings. Instead of requiring workstations to open large database files across the network - as was necessary with the older Access-based system - SQL enables the server to search through comps, images, the file cabinet, and more on its own hard drive and simply return the results to the workstation.

If you want to install WinTOTAL on an office network so that you can share your WinTOTAL setup with everyone in the office, see our WinTOTAL Networking Guide for specific steps on this process.

Note: Aurora is not designed nor tested for use with Microsoft's Remote Desktop (Terminal Services). As a result, we don't support installing Aurora in a Remote Desktop environment, and our Support Technicians are unable to troubleshoot any potential problems.

Install WinTOTAL on a Laptop

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Installing WinTOTAL on a laptop can be a great way for you to make WinTOTAL for Mobile but also bring your data back into the office to work on a dedicated computer or network. If you intend to use your laptop while on the go, but use a dedicated workstation otherwise, you should install WinTOTAL on your laptop first. Then, youï¿½ll need to perform some additional setup to ensure that your laptop and your dedicated office workstation or network can talk to each other. For detailed steps on this process, see Tech Doc 5080.

Configure Your Firewall

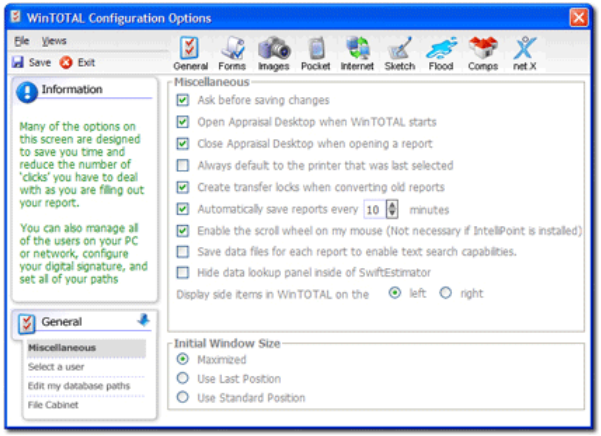
Since WinTOTAL relies heavily on the Internet as a resource for flood and census data, maps, updates, and communication with your XSite, it's very important that any firewall programs you may have do not interfere with those processes. If you're experiencing regular problems inside WinTOTAL and you know that you have a firewall program installed, consult one of our firewall documents below.

- Tech Doc 4016 - Effects of Antivirus & Firewall Programs on WinTOTAL
- Tech Doc for Configuring ALL Firewall Programs for WinTOTAL

Configure WinTOTAL

WinTOTAL provides an array of options you can define to design your optimal appraisal experience. We've gone to great lengths to make the application as widely useful as possible, right out of the box. But we recognize that every appraiser has unique requirements and habits. You can access WinTOTAL's configuration settings in one of two ways:

1. From the Windows **Start** menu, choose **[All] Programs**, **WinTOTAL**, **WinTOTAL Configuration Utility**.
2. From within WinTOTAL or the Appraisal Desktop, choose **Options**, **Configure WinTOTAL settings**.


WinTOTAL Configuration Options
File Views
Save Exit
General Forms Images Pocket Internet Sketch Flood Comps net X
Information
Many of the options on this screen are designed to save you time and reduce the number of 'clicks' you have to deal with as you are filling out your report.
You can also manage all of the users on your PC or network, configure your digital signature, and set all of your paths
Miscellaneous
Ask before saving changes
Open Appraisal Desktop when WinTOTAL starts
Close Appraisal Desktop when opening a report
Always default to the printer that was last selected
Create transfer locks when converting old reports
Automatically save reports every 10 minutes
Enable the scroll wheel on my mouse (Not necessary if IntelliPoint is installed)
Save data files for each report to enable text search capabilities.
Hide data lookup panel inside of SwiftEstimator
Display side items in WinTOTAL on the left right
General
Miscellaneous
Select a user
Edit my database paths
File Cabinet
Initial Window Size
Maximized
Use Last Position
Use Standard Position

Inside the configuration tool, you can:

- Change your auto-save settings
- Set up WinTOTAL user profiles and signatures
- Decide whether your drop-down lists contain Recent Responses or QuickLists
- Create custom labels for the photos in your database
- Install and configure Pocket TOTAL
- Configure WinTOTAL's Internet connection
- Set up automatic updates
- Integrate with your favorite sketching software

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- Integrate with InterFlood or your XSite
- And more…

Configuration Options

The configuration utility is divided into several sections, indicated by the icons in the toolbar. Then, inside each section, look to the pane on the left for additional relevant functions. Here's a brief description of the options contained in each section.

General – Various settings controlling how the application appears, plus settings for individual users

Forms – Settings that allow you to control how WinTOTAL functions during formfilling

Images – Settings for image size, quality, and labeling

Pocket - Pocket TOTAL installation and configuration tools

Internet - Internet connection and update settings

Sketch – Settings for your preferred sketching software

Flood – Flood map integration and colorization settings

Comps – Automatic latitude and longitude retrieval settings for comps

net.X – Integration and synchronization settings for your XSite

Click an icon to access the various settings in WinTOTAL, make changes to your WinTOTAL configuration, and click **Save** to apply these changes.

General Settings

To get the most out of WinTOTAL, you should customize some of the configuration options to suit the way you work. To access WinTOTAL's general program settings…

1. From the WinTOTAL Configuration Utility, click the **General** icon in the toolbar.

2. Apply your preferred settings and click **Save**. The available settings include:
   - **Ask before saving changes** – Whenever you close a report, or exit WinTOTAL, the program checks to see if you have made any changes to the file. By enabling this option, WinTOTAL prompts you before saving changes you've made to your reports. If you disable this feature, WinTOTAL saves your changes automatically.
   - **Open Appraisal Desktop when WinTOTAL starts** – Check this option to ensure that WinTOTAL opens the Appraisal Desktop whenever you open it.
   - **Close Appraisal Desktop when opening a report** – Check this option to close down the Appraisal Desktop whenever WinTOTAL starts to that you can reclaim any resources used by the Appraisal Desktop. If you need both WinTOTAL and the Appraisal Desktop open at the same time, leave this option unchecked.
   - **Always default to the printer that was last selected** – If you regularly switch back and forth between several printers in your office, you can select

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this option if you want WinTOTAL to remember the last printer you used. If you'd prefer to always use your default printer, turn this option off.

- **Create transfer locks when converting old reports** – WinTOTAL attempts to save you time by pushing relevant data forward into related fields in your report. To ensure that you have full control over those fields, WinTOTAL also provides a way to disable this behavior so you can enter the exact data you want into those fields. Since older versions of WinTOTAL didn't have this feature, you can enable this option to ensure that your old report data remains intact when you merge it into your new reports.
- **Automatically save report every XX minutes** – If you enable this option and specify a number of minutes in the provided box, you can set WinTOTAL to automatically save your report every so often. This is a great way to make sure that system crashes don't cause you to lose work as well.
- **Enable the scroll wheel on my mouse –** If you use a mouse equipped with a scroll wheel, you may need to enable this setting for it to work properly within WinTOTAL.
- **Hide data lookup panel inside of SwiftEstimator** – If you're using WinTOTAL's integration with SwiftEstimator to produce your cost estimates, you can toggle the data lookup panel that shows you key information from your report on the left side of that feature. Check the box to hide the data lookup panel or leave it unchecked to continue showing the data lookup panel.
- **Display side items in WinTOTAL** – By default, your QuickLists and the panes containing other relevant features appear on the left side of your screen. If you'd prefer, mark the **Right** option to move them to the other side.
- **Initial Window Size –** These options specify how the WinTOTAL and Appraisal Desktop screens appear when you launch the application. Options are:
  - **Maximized –** With this setting, WinTOTAL opens to its maximum capacity so that it encompasses your entire screen.
  - **Use Last Position –** With this setting, WinTOTAL remembers the size and location of the window when you last closed it and then it uses that same combination when you next open WinTOTAL.
  - **Use Standard Position –** With this setting, WinTOTAL and the Appraisal Desktop open in the center of your screen.

Manage User Accounts

WinTOTAL tailors certain program settings to the needs of the various users in your WinTOTAL installation allowing multi-appraiser offices to use the same WinTOTAL installation while still enjoying a personalized user environment. If you tie WinTOTAL with your XSite, this can also ensure that the proper file permissions are set in WinTOTAL so that only the assigned appraiser and supervisor can work with a given report file. To access WinTOTAL's user management tools…

1. From the WinTOTAL Configuration Utility, click the **General** icon in the toolbar.

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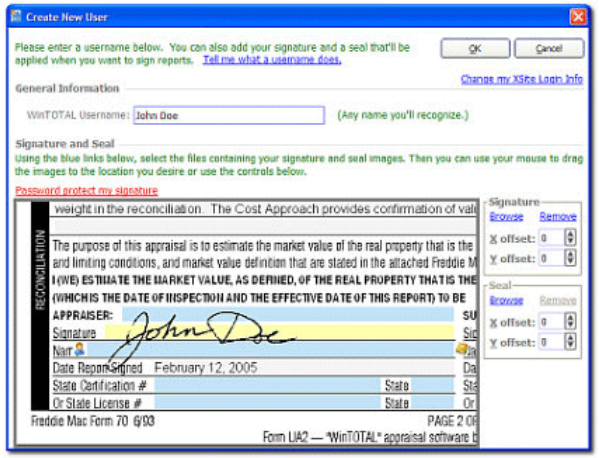
2.Click **Select a User** in the **General** pane to the left.

Create User Accounts

From WinTOTAL's user manager, you can create and edit a list of user accounts that can access WinTOTAL. If you have more than one person who uses WinTOTAL on your computer or network, you should create an account for each user so that you can keep everyone's settings, signatures, and QuickLists separate. To add a user account or edit an existing account…

1.From WinTOTAL's user manager, click **Add** to create a new user or select an existing user from the **Available** list and click **Edit** to open the profile for editing.


Create New User
Please enter a username below. You can also add your signature and a seal that'll be applied when you want to sign reports. Tell me what a username does.
OK
Cancel
Change my XSite Login Info
General Information
WinTOTAL Username: John Doe
(Any name you'll recognize.)
Signature and Seal
Using the blue links below, select the files containing your signature and seal images. Then you can use your mouse to drag the images to the location you desire or use the controls below.
Password protect my signature
Signature
Browse
Remove
X offset: 0
Y offset: 0
Seal
Browse
Remove
X offset: 0
Y offset: 0
RECONCILIATION
weight in the reconciliation. The Cost Approach provides confirmation of val
The purpose of this appraisal is to estimate the market value of the real property that is the
and limiting conditions, and market value definition that are stated in the attached Freddie M
I (WE) ESTIMATE THE MARKET VALUE, AS DEFINED, OF THE REAL PROPERTY THAT IS THE
(WHICH IS THE DATE OF INSPECTION AND THE EFFECTIVE DATE OF THIS REPORT) TO BE
APPRAISER:
Signature
John Doe
Name
Date Report Signed February 12, 2005
State Certification #
State
Or State License #
State
Freddie Mac Form 70 6/93
PAGE 2 OF
Form UA2 — "WinTOTAL" appraisal software b

2.Type a name for the user profile into the **WinTOTAL Username** box.

3.If you need to associate your WinTOTAL account with an account on your XSite, click **Change My XSite Login Info** in the upper right corner and enter your username and password.

4.Be sure to set up your signature and seal.

5.When finished, click **OK** to save your account.

Once your user information screen is complete, click to save this user profile. Then, repeat this process to create profiles for all of the WinTOTAL users in your office. Later, if you need to delete any user profile, select it in the **Available** box and click **Remove**.

Note: If you need further assistance with this process or if you need some help creating your digital signature file, see Tech Doc 5056 on digital signature setup and creation.

Set Up Your Signature

1.From WinTOTAL's user manager, select the user account needing a signature and click **Edit** or click **Add** to create a new account.

2.Change any profile information as necessary.

3.Then, click **Browse** in the **Signature** box, navigate through your hard drive to find your signature file, select it, and click **Open** to drop your digital signature into the sample form block.

4.Click and drag the signature image to position it properly on the signature line.

5.When you're satisfied with your signature placement, click the link to **Password Protect my Signature**. This ensures that nobody can place your signature on a report without knowing your password.

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6. Type a password into the field and click **OK**.
7. Repeat steps 3 and 4 using the links in the **Seal** box if you would like to add your digital seal to your reports.
8. Finally, if you want to associate this WinTOTAL account with the same user's profile on your XSite, click **Change my XSite Login Info**, type in the user's a la mode **Username** and **Password**, and click **OK**.

Set the Current User

While WinTOTAL prompts you about which user profile you want to use when you log into WinTOTAL, you can switch the active user profile at any time by accessing the WinTOTAL's user manager. To do so…

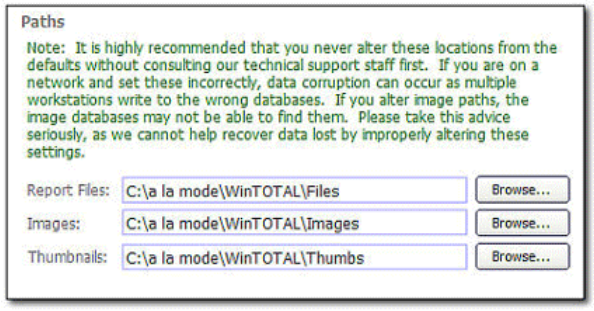
1. From WinTOTAL's user manager, select the name for the profile you wish to activate in the list of users and then click **Set User**.
2. If this is the primary or only user of this system, check the box to **Automatically Login Using this Name in the Future**.

Hint: If this option is not selected, and there are multiple user profiles configured on your system, WinTOTAL prompts you to select a user each time you load it.

Change Database Locations

WinTOTAL allows you to configure the location or "path" of your report files, images, and image thumbnails on your computer. If you choose to change these settings, keep in mind that configuring them incorrectly could interfere with WinTOTAL's ability to create, load, and save certain types of files that it uses. For this reason, we recommend that you only change these settings at the direction of an a la mode technical support representative. In the event that you choose to do so on your own…

1. From the General Settings section of WinTOTAL Configuration Utility, click **Edit my Database Paths** in the **General** pane to the left.
2. If you're storing your report files, images, or image thumbnail files on your computer in a non-standard location, just type in or **Browse** to the folder where you're storing each type of file.


Paths
Note: It is highly recommended that you never alter these locations from the defaults without consulting our technical support staff first. If you are on a network and set these incorrectly, data corruption can occur as multiple workstations write to the wrong databases. If you alter image paths, the image databases may not be able to find them. Please take this advice seriously, as we cannot help recover data lost by improperly altering these settings.
Report Files:
C:\a la mode\WinTOTAL\Files
Browse...
Images:
C:\a la mode\WinTOTAL\Images
Browse...
Thumbnails:
C:\a la mode\WinTOTAL\Thumbs
Browse...

3. Click **Save** when finished to accept your changes.

File Cabinet Settings

WinTOTAL's File Cabinet settings allows you to enable or disable the Detailed View in the Appraisal Desktop, change the alternate report color WinTOTAL uses in the File Cabinet or configure the "stop lights" you see there. To access and change WinTOTAL's File Cabinet settings…

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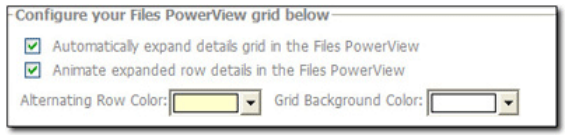
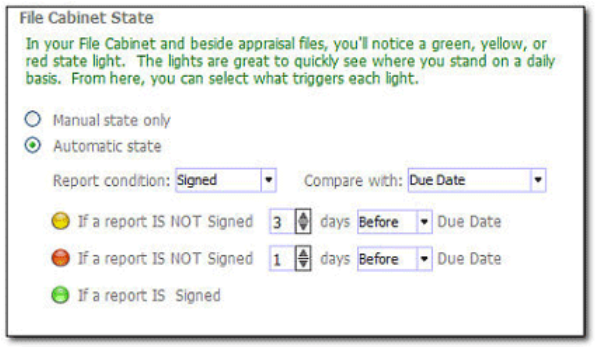
1. From the General Settings section of WinTOTAL Configuration Utility, click **File Cabinet** in the **General** pane to the left.
2. Mark your preferred options from those provided. Options are:
   - **Automatically expand details grid** - Enables the File Cabinet's automatic detailed view expansion feature.
   - **Animate expanded row details in the Files PowerView** – When checked, WinTOTAL automatically slides the detailed file view onto the screen as you access each report. When this option is unchecked, the detailed view simply pops open.
   - **Alternating Row Color -** Controls the background color that WinTOTAL uses for every other row in the File Cabinet.
   - **Grid Background Color –** Controls the color that WinTOTAL uses as the background color for the details view.


Configure your Files PowerView grid below
Automatically expand details grid in the Files PowerView
Animate expanded row details in the Files PowerView
Alternating Row Color:
Grid Background Color:

File Cabinet Stop Lights

This setting enables the Appraisal Desktop to automatically track the status of your reports and present them in a simple color-coded "stop-light" view.

1. From the General Settings section of WinTOTAL Configuration Utility, click **File Cabinet** in the **General** pane on the left.
2. If you want to manage file status on your own, select the **Manual state only** option. To have WinTOTAL manage the process, click **Automatic state**, then select from the reporting options presented.
   - Currently you can base the stop-light reporting on a comparison of the date you sign a report to either the **Due Date**, the **Order Date** or the **Appraisal Start Date**. Choose one of these options from the **Compare with** drop-down menu.
   - Adjust the date thresholds for the yellow and red alert levels. Enter the number of days before or after the "Compare with" date, choosing **Before** or **After** from the drop-down menu.


File Cabinet State
In your File Cabinet and beside appraisal files, you'll notice a green, yellow, or red state light. The lights are great to quickly see where you stand on a daily basis. From here, you can select what triggers each light.
Manual state only
Automatic state
Report condition: Signed
Compare with: Due Date
If a report IS NOT Signed 3 days Before Due Date
If a report IS NOT Signed 1 days Before Due Date
If a report IS Signed

3. Finally, click **Save** to apply your changes.

Formfilling Preferences

The **Forms** section of the **Configuration Options** screen controls how WinTOTAL operates displays and manipulates the data in your forms. By modifying these settings you can control how QuickLists function in multi-line fields, enable or disable WinTOTAL's data transfer functions, and tweak your

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spellchecking preferences. These settings also include the ability to change the look and feel of the program and options for spell checking your reports. To access WinTOTAL's **Forms** settings…

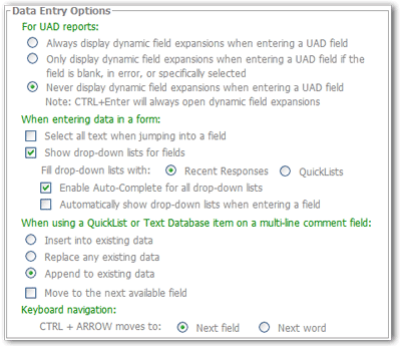
1. From the WinTOTAL Configuration Utility, click the **Forms** icon in the toolbar.

2. Apply your changes and click **Save**.

Data Entry Options

WinTOTAL's Data Entry Options control how your cursor, QuickLists, and drop-down menus function when you are moving through the forms. To access your Data Entry Options…

1. From the Forms section of WinTOTAL Configuration Utility, click **Data Entry Options** in the **Formfilling** pane on the left.


Data Entry Options
For UAD reports:
Always display dynamic field expansions when entering a UAD field
Only display dynamic field expansions when entering a UAD field if the field is blank, in error, or specifically selected
Never display dynamic field expansions when entering a UAD field
Note: CTRL+Enter will always open dynamic field expansions
When entering data in a form:
Select all text when jumping into a field
Show drop-down lists for fields
Fill drop-down lists with: Recent Responses QuickLists
Enable Auto-Complete for all drop-down lists
Automatically show drop-down lists when entering a field
When using a QuickList or Text Database item on a multi-line comment field:
Insert into existing data
Replace any existing data
Append to existing data
Move to the next available field
Keyboard navigation:
CTRL + ARROW moves to: Next field Next word

2. Mark your preferences in the screen that appears. Options are…

- **Always display dynamic field expansions when entering a UAD field** - Select this item if you'd like to all the assistance available when you first enter a field that's affected by UAD.
- **Only display dynamic field expansions when entering a UAD field if the field is blank, in error, or specifically selected** - This still lets you see the UAD assistance via expanded fields, but only does so in cases where the field is blank, in error, or specifically selected
- **Never display dynamic field expansions when entering a UAD field** - This option is also known as Freeform UAD mode. The dynamic field expansions will not be displayed unless you press CTRL+ ENTER. You can type the UAD formatted text or use the available shorthand to make formfilling faster.
- **Select all text when jumping into a field –** When you select this option, each time you enter a field in a form, any existing text in that field is automatically selected. That way, you can begin typing and the old data is completely replaced with the new. If this option is turned off, your cursor is placed at the beginning of the field and you can use the arrow keys or mouse to re-position the cursor and enter data.
- **Show drop-down lists for fields –** One of the innovations found in our previous version of WinTOTAL was the "Recent Response" list. Each field in your forms would automatically remember the last several items you typed in. The next time you entered that field, you could reapply that text simply by choosing it from a drop-down menu. To use the "Recent Responses" feature in WinTOTAL, check the box beside this option and then mark the **Recent Responses** option.

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Unfortunately, the "Recent Responses" feature led to some confusion with our QuickLists text databases. So, in Aurora, you have the option of displaying your QuickList items each field's drop-down menu instead of the recent responses. To do so, check the box beside this option and then mark the **QuickLists** option. Whichever option you choose for your drop-down lists, you have two additional options:

- **Enable Auto-Complete –** When this option is turned on, you can begin typing information into any field that has **Recent Responses** or **QuickLists** enabled. WinTOTAL watches what you type and displays items from your lists that match. Once the correct list item is displayed, just press **Enter** to accept that item. This function is very similar to the way the address bar works in Microsoft Internet Explorer.
- **Automatically show drop-down lists –** If you're using the auto-complete function, chances are you may not want to see the drop-down menus at all. The data is still available, but you won't be bothered by the menu icons. Turn this option on if you always want the option of picking items from the drop-down menus as well.
- **Options for Inserting QuickLists items in multi-line fields** – As you build QuickList entries for multi-line fields, you need to decide if you prefer to have a few, very-long comments, or several smaller comments that you chain together. Depending upon how you build your lists, you need to adjust these settings.
  - **Insert into existing data –** Use this option if you want to insert QuickList items into the middle of existing text. When it is turned on, the program inserts the QuickList item wherever in the field you have your cursor.
  - **Replace any existing data –** If you do choose to create fewer, but longer, QuickList and Text Database items, select this option. When it's turned on, the program overwrites any existing field data with the new data from your list.
  - **Append to existing data –** If you've created QuickList or Text Database items that build on each other, the this option may help. When it's turned on, the program inserts your items at the end of the current field, regardless of where your cursor is.
  - **Move to the next available field –** This option controls what your cursor does after you've inserted a QuickList or Text Database item. When it's turned on, after you insert an item, the cursor immediately moves to the next field in the form. This can really speed up data entry as you don't have to press **Enter** to accept the text item.
- **Keyboard navigation –** Holding down the Ctrl key on your keyboard and pressing the left or right arrow keys allows you to move through your text in a more word-processor like manner. Mark the option for the behavior you want to use. Options are:
  - **Next Field –** Causes the cursor to move to the next field in your form.
  - **Next Word –** Causes the cursor to move to the beginning of the next word in your field.

3. When finished, click **Save** to put your settings into effect.

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Fonts & Form Colors

If you don't like how the programmers at a la mode designed the look of the program, you can change the look in this section of WinTOTAL's **Configuration Options** to reflect your sense of style. To access and change WinTOTAL's look and feel…

1. From the Forms section of WinTOTAL Configuration Utility, click **Fonts and Form Colors** in the **Formfilling** pane on the left.
2. Apply your changes and click **Save**.

Fonts

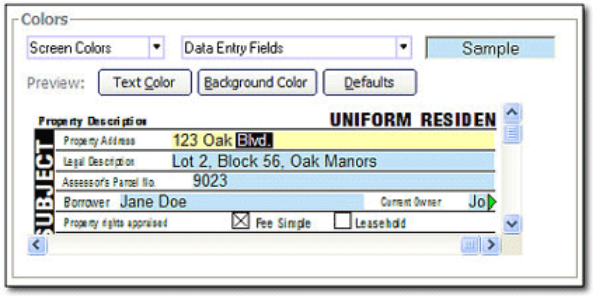
WinTOTAL stores a separate default font for your forms and your addenda. To change the typeface used when you print your forms…

1. If you have not already done so, open WinTOTAL's forms and fonts manager by following the steps above.
2. Then, click the **Data Font** button in the **Fonts** section at the top.
3. Choose the font, style and size from the **Font** screen. Then, click **OK**.
4. Click **Addenda Font** and repeat the process, choosing the same or a different font, as you desire.

It is recommended that you modify this setting instead of continually "selecting all" and changing the fonts manually in each document.

Colors

If you don't like the standard black text on a white background, this is the place for you to exercise your creativity. You can change just about any aspect of the screen coloring, as well as the colors of your output, if you print on a color printer.



Hint: While it is tempting to infuse your working environment with a little pizzazz, remember that you have to stare at these screen colors, often for hours on end. Studies have shown that eye fatigue can be compounded by poor screen contrasts or vivid background colors. So, use caution before adjusting these settings to the extreme.

To set your Screen Colors…

1. If you have not already done so, open WinTOTAL's forms and fonts manager by following the steps above.
2. Choose **Screen Colors** from the drop-down menu at the top.
3. Select one of the specific field options from the drop-down menu on the right. A sample of the current settings is displayed.
4. Click either **Text Color** or **Background Color** to change either aspect of that field.

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5. Select one of the pre-defined colors from the palette, or click **Define Custom Colors** to create your own favorite shade. Click **OK** when finished. The sample screen shows the results of your changes.

To set your Printer Colors…

1. If you have not already done so, open WinTOTAL's forms and fonts manager by following the steps above.
2. Choose **Printer Colors** from the drop-down menu at the top.
3. Then follow the same steps above to change how your report prints. Remember that if you deliver your reports via e-mail or through your XSite in PDF format, the color settings will be included in that PDF file.

To reset your colors…

If you do make changes to your color settings and later decide that you've done more harm than good…

1. If you have not already done so, open WinTOTAL's forms and fonts manager by following the steps above.
2. Click **Defaults** to reset everything back to its original settings.

Initial Form Zoom Level

The Initial Form Zoom Level section allows you to set the default zoom level with which WinTOTAL displays reports when you open them. If you have a particularly large display unit on your computer, you may need to experiment with the various zoom levels to find the one that is the right balance of text size versus the amount of the form that is displayed. If you're using a single, standard-sized monitor, choosing **Page Width** is probably your best bet. To change your default zoom level…

1. If you have not already done so, open WinTOTAL's forms and fonts manager by following the steps above.
2. Choose your preferred default zoom level from the available drop-down menu in the **Initial Form Zoom Level** section of this screen.

Check Box Appearance

Even though the appearance of most forms is dictated by third-party entities like Fannie-Mae, many appraisers like to adjust the appearance of the check boxes on the forms. To change your check box appearance…

1. If you have not already done so, open WinTOTAL's forms and fonts manager by following the steps above.
2. If you'd like your check boxes to print out a bit darker, choose either **Dark**, **Darker** or **Darkest** from the drop-down menu.
3. Click **Save** in the upper-left, then close WinTOTAL. When you start WinTOTAL again, your checkbox preferences will go into effect.

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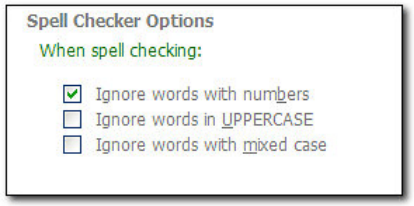
Spell Check Options

You can change WinTOTAL's spellchecking to react to certain types of data like words that contain numbers. Appraisals often contain lot numbers, plat designations and other information that combine numbers and letters. To change the way WinTOTAL handles this type of information…

1. From the Forms section of WinTOTAL Configuration Utility, click **Spell Check Options** in the **Formfilling** pane on the left.



2. Mark the boxes beside the options you wish to use. Options are:
   - Ignore words with numbers
   - Ignore words in upper
   - Ignore words with mixed case
3. When finished, click **Save** to put your changes into effect.

Image Settings

WinTOTAL's image options allow you to control how WinTOTAL manages the photos you use in your reports. Using these options you can add photo labels to the Images PowerView, ensure that comps you import into your comps database contain the images from your reports, and decide how WinTOTAL displays image previews. To change your image options…

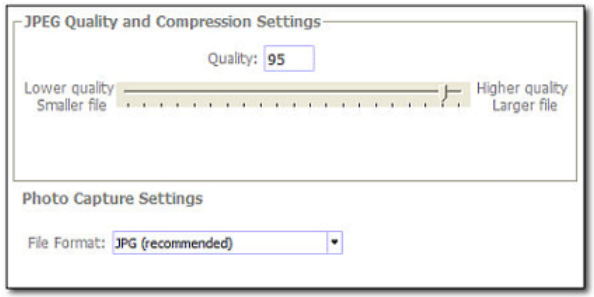
1. From the WinTOTAL Configuration Utility, click the **Images** icon in the toolbar.

2. Apply your changes and click **Save**.

Image Quality Settings

Today's multi-megapixel digital cameras can produce photos in details far beyond what is necessary for the standard appraisal report. Unfortunately, these photos can rapidly use up even the ample space provided on today's computers. To reduce this problem, you can adjust the compression that WinTOTAL uses when storing images. To do so…

1. From the Images section of WinTOTAL Configuration Utility, click **Image Quality Settings** in the **Photos** pane on the left side of the screen.



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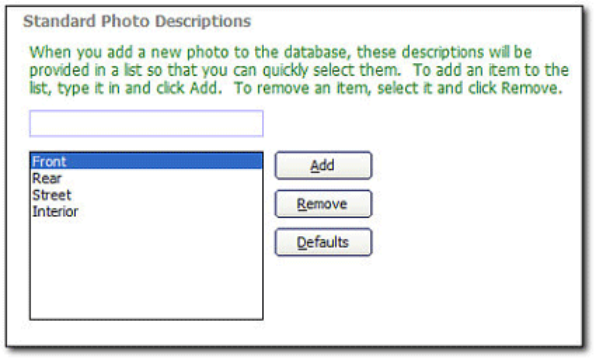
2. Use the slider to change the quality percentage you want to use. You may need to experiment with this setting to find the balance that's right for your reports.
3. The **Photo Capture Settings** option allows you to specify the file format that WinTOTAL uses by default. This option is only used in rare instances and should most often be left to its default setting: JPG.
4. Click **Save** when finished to put your configuration changes into effect.

Create Photo Labels

When you add photos to the WinTOTAL image database, you have the option of labeling them as to their purpose. Of course, the most common appraisal descriptions (Front, Rear, Street, Interior) are already included. However, if you'd like to add your own description or manage your existing descriptions…

1. From the Images section of WinTOTAL Configuration Utility, click **Create Photo Labels** in the **Photos** pane on the left side of the screen.

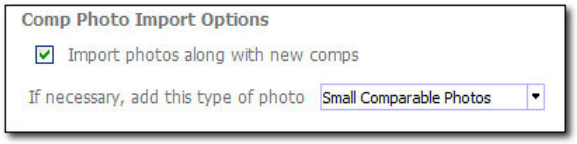

Standard Photo Descriptions
When you add a new photo to the database, these descriptions will be provided in a list so that you can quickly select them. To add an item to the list, type it in and click Add. To remove an item, select it and click Remove.
Front
Rear
Street
Interior
Add
Remove
Defaults

   - To add a label, type the label you want to add into the text field and click **Add**.
   - If you no longer need a particular description, select it in the list and click **Remove**, or click **Defaults** to remove all of the types you may have added and revert to the original list.
2. Click **Save** to put your configuration changes into effect.

Comp Photo Import Settings

If you are going to import comparables from another source that includes photos, such as old appraisal reports you can change how WinTOTAL handles those photos by changing your comp photo import settings. To do so…

1. From the Images section of WinTOTAL Configuration Utility, click **Create Photo Labels** in the **Photos** pane on the left side of the **WinTOTAL Configuration Options** screen.


Comp Photo Import Options
Import photos along with new comps
If necessary, add this type of photo
Small Comparable Photos

2. Check the box to **Import photos along with new comps** if you want WinTOTAL to ensure that you always have both the data for the comp and the images associated with them.
3. From the drop-down menu, choose the size of comp photo you prefer to use in your reports to ensure that WinTOTAL provides the right size.
4. Click **Save** to put your changes into effect.

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Pocket TOTAL Setup

Note: These instructions are for Pocket TOTAL, the legacy version of our field data-gathering software. While we no longer sell Pocket TOTAL, you are able to continue using it if you still have a valid license. If you were looking for our current mobile data-gathering software, TOTAL for Mobile, click here.

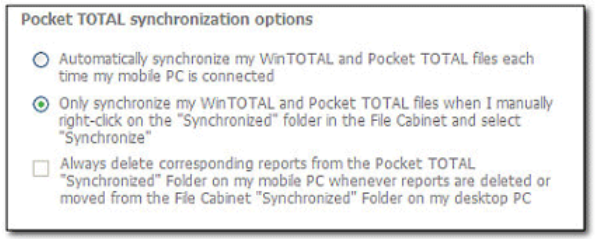
Pocket TOTAL was a la mode's field data gathering tool prior to TOTAL for Mobile. If you still have the legacy Pocket PC hardware and a Pocket TOTAL license, you're able to continue using Pocket TOTAL as you have been.

If you need help installing Pocket TOTAL, click here for the Pocket TOTAL User's Guide.

Synchronization Options

Once Pocket TOTAL has been installed and registered, the program is designed to automatically merge data from your hand-held device with reports on your desktop. This function happens whenever you connect your Pocket PC to your desktop system. In the **Configuration Options** settings, you have the choice of synchronizing automatically whenever you connect, or to only synchronize when you tell it to. To change your synchronization settings…

1. From the Pocket section of WinTOTAL Configuration Utility, click **Synchronization Options** in the **Pocket** pane on the left side of the screen.
2. Mark the option you'd prefer to use with Pocket TOTAL. Options are:
   - Automatically synchronize WinTOTAL and Pocket TOTAL when you connect your Pocket PC
   - Manually synchronize WinTOTAL and Pocket TOTAL by clicking **Pocket Sync** in the Appraisal Desktop.
   - In addition, WinTOTAL can help you maximize the storage space on your Pocket PC by deleting files from Pocket TOTAL whenever you delete the corresponding file in the Appraisal Desktop's **Synchronize** folder. To enable this handy feature, click the **Always delete…** check box on this screen.


Pocket TOTAL synchronization options
Automatically synchronize my WinTOTAL and Pocket TOTAL files each time my mobile PC is connected
Only synchronize my WinTOTAL and Pocket TOTAL files when I manually right-click on the "Synchronized" folder in the File Cabinet and select "Synchronize"
Always delete corresponding reports from the Pocket TOTAL "Synchronized" Folder on my mobile PC whenever reports are deleted or moved from the File Cabinet "Synchronized" Folder on my desktop PC

3. Click **Save** when finished to put your configuration changes into effect.

Set Up Your Connection

WinTOTAL relies on access to the Internet to provide several features. Net.X maps and XSite integration being two, not to mention access to an e-mail account for report delivery. For you to get the most from WinTOTAL, you should ensure that your computer is properly connected to the Internet.

A high-speed Internet connection such as that provided by DSL or cable is highly recommended. However, WinTOTAL can work through a dial-up connection, if that is all that is available to you. To access WinTOTAL's Internet configuration options…

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1. From the WinTOTAL Configuration Utility, click the **Internet** icon in the toolbar.

2. Apply your changes and click **Save**.

Depending on your needs, there are two different ways to configure your Internet connection: for dial-up and for high speed.

Set Up High Speed Connections

To configure your system to allow WinTOTAL to access the Internet…

1. From the Internet section of WinTOTAL Configuration Utility, click **Trusted Sites** to ensure that WinTOTAL can connect to all pertinent a la mode servers**.**
2. Then, click **Internet Setup**.
3. In the screen that appears, the first option is to select whether you have a modem-based connection, or an "always on" Internet connection. Click the option for **An "always on" or LAN connection** then click **Next**.

Internet Setup Wizard
Specify how your system is connected to the Internet
Please select the type of connection WinTOTAL should use to make use of the Internet.
Modem and phone line
Select this option if you connect to your Internet Service Provider (ISP) through a standard Dial-Up Networking (DUN) connection. WinTOTAL will connect and disconnect as needed.
An "always on" or LAN connection
With this setting, WinTOTAL will assume you are already online when it needs to access the Internet. Select this option if your PC is connected via a Local Area Network (LAN), a cable modem, DSL line that doesn't require dialing, and ISP's with proprietary sign on processes, like AOL.
Back
Next >
Cancel

4. Select the option to "test drive" your connection, then click **Next**. The setup wizard attempts to make a connection with the Internet.
   - If all goes well, the wizard informs you that it has, so click **Finish** to complete the configuration.
   - If the wizard encounters a problem connecting, it notifies you and gives you the option of making another attempt or exiting the wizard. If you think there was a mistake, try the connection again by selecting the first option, then clicking **Next**. Otherwise, choose the second option and click **Finish**.

At this point if you're unable to connect, you need to troubleshoot your Internet connection from your PC. The first thing you should check is whether you can access the Internet from another application. Launch your web browser and try to access a popular site like www.google.com or www.yahoo.com.

- If you're not able to access either of these sites, chances are there's a problem either with your connection or with traffic through the Internet itself.

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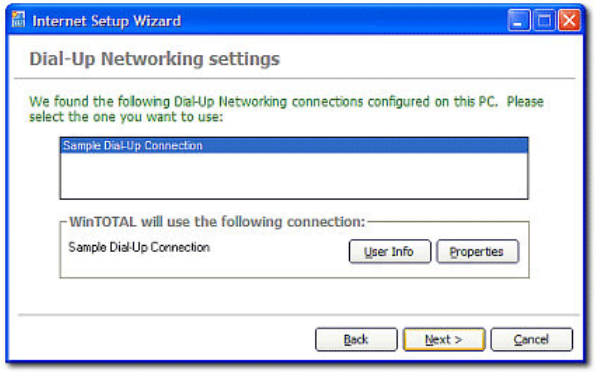
- If you've confirmed your connection to the Internet is working, repeat steps 1-3 above to configure your connection.

Set Up Dial-up Connections

If you are still using a dial-up connection to reach the Internet, follow these steps…

1. From the Internet section of WinTOTAL Configuration Utility, click **Trusted Sites** to ensure that WinTOTAL can connect to all pertinent a la mode servers**.**
2. Then, click **Internet Setup**.
3. Select the **Modem and phone line** option and click **Next**.
4. The wizard scans your system and displays any Dial-Up Network connections you have configured on your system. If none are found, a message appears notifying you that you need to setup your Dial-Up Network connection(s). In this case, you must first configure a dial-up connection in your Windows operating system. Consult the Windows user guide for assistance with this process.
5. Select the desired dial-up connection from the list and click **Next**.


Internet Setup Wizard
Dial-Up Networking settings
We found the following Dial-Up Networking connections configured on this PC. Please select the one you want to use:
Sample Dial-Up Connection
WinTOTAL will use the following connection:
Sample Dial-Up Connection
User Info
Properties
Back
Next >
Cancel

6. Now, select the option to "test drive" your connection and click **Next**. The setup wizard attempts to activate your modem and make a connection with the Internet.
   - If all goes well, the wizard informs you that it has, so click **Finish** to complete the configuration.
   - If the wizard encounters a problem connecting, it notifies you and gives you the option of making another attempt or exiting the wizard. If you think there was a mistake, try the connection again by selecting the first option, then clicking **Next**. Otherwise, choose the second option and click **Finish**.

At this point, if you are unable to connect you need to troubleshoot your Internet connection from your PC. The first thing you should check is whether you can access the Internet from another application. Launch your web browser and try to access a popular site like http://www.google.com/ or http://www.yahoo.com/.

- If you're not able to access either of these sites, chances are there's a problem either with your connection or with traffic through the Internet itself.

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- If you've confirmed your connection to the Internet is working, repeat steps 1-5 above to configure your connection.

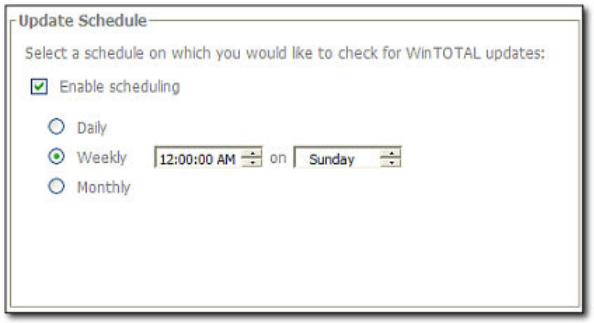
Schedule Automatic Updates

You can schedule WinTOTAL to keep itself up to date automatically. Particularly if you have a high speed Internet connection, it's a good idea to configure WinTOTAL to download updates so that you don't have to manually download the latest features, fixes, and forms yourself. To configure automatic updating in WinTOTAL:

1. From the Internet section of WinTOTAL Configuration Utility, check **Enable Scheduling**.

2. Pick either a **Daily**, **Monthly**, or **Weekly** frequency and schedule a time and/or date for WinTOTAL to automatically download and install the latest updates.

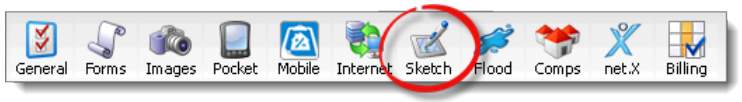
3. When you're finished, click **Save**.



Set Up Your Sketcher

WinTOTAL and a TOTAL Sketch Pro license make it possible to integrate WinTOTAL with any participating sketch program. While WinTOTAL is fully capable of integrating with the sketch program of your choice, each available sketching program with which you can integrate is produced by a third-party vendor. As a result, you must maintain a separate license for your Apex, RapidSketch, or AreaSketch software, along with WinTOTAL. If you need more information about the sketch programs with which WinTOTAL can integrate or are interested in purchasing a sketch license from any of the available vendors, visit WinTOTAL's Store by clicking the **Dashboard** icon on the upper right of the appraisal desktop or a report. To access WinTOTAL's sketch configuration options and select your default sketching software:

1. From the WinTOTAL Configuration Utility, click the **Sketch** icon in the toolbar.



2. Select your sketching software from the **Choose your sketcher** drop-down menu.

3. Apply your changes and click **Save**.

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Register Apex

If you've been using the custom version of Apex 3 or the old version of Apex 2 originally distributed with WinTOTAL, you need not purchase an additional license. Everything will continue to operate as if nothing changed. To integrate your sketch program with WinTOTAL…

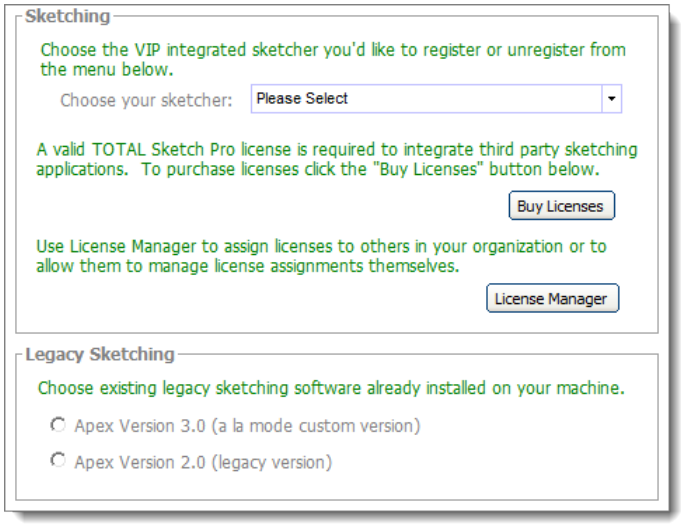
1. From the WinTOTAL Configuration Utility, click the **Sketch** icon in the toolbar.

2. Apply your changes and click **Save**.

Internet Registration

To register one of your Apex licenses on a workstation…

1. Install and launch WinTOTAL on the workstation. This can be a stand-alone computer, or a node in a local area network. Also, ensure that the computer has access to the Internet, either through an always-on connection or dial-up.
2. From the Sketching settings in WinTOTAL Configuration Utility, select the **Apex** option corresponding to the version you own. If you only have one available legacy Apex license type, it's automatically selected for you.


Sketching
Choose the VIP integrated sketcher you'd like to register or unregister from the menu below.
Choose your sketcher:
Please Select
A valid TOTAL Sketch Pro license is required to integrate third party sketching applications. To purchase licenses click the "Buy Licenses" button below.
Buy Licenses
Use License Manager to assign licenses to others in your organization or to allow them to manage license assignments themselves.
License Manager
Legacy Sketching
Choose existing legacy sketching software already installed on your machine.
Apex Version 3.0 (a la mode custom version)
Apex Version 2.0 (legacy version)

3. Then click the **Register** link that appears.
4. The **Apex Registration Wizard** appears and gives you the option of registering through the Internet, or manually. We recommend using the Internet registration, as this speeds up the process significantly. Click the **Internet Registration** option and click **Next**.
5. Now, the wizard prompts you to enter your first and last names, and prompts you with the name assigned to this workstation. These items are used to help you manage which users and systems have your licenses in use. Complete the fields, then click **Finish**.
6. The wizard accesses the a la mode servers through the Internet and confirms that your customer account has an available license to assign to this machine. If so, the license is assigned, your account is updated and you should see a screen telling you how many licenses you have left. Click **OK** and you're done.

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7. If the wizard discovers that you do not have an available license, it prompts you with that information and directs you to contact the a la mode for additional assistance.

Fax Registration

If you do not have a connection to the Internet, you can register your Apex sketch software manually. To do so…

1. Install and launch WinTOTAL on the workstation.
2. From the Sketching settings in WinTOTAL Configuration Utility, select the **Apex** option corresponding to the version you own. If you only have one available legacy Apex license type, it's automatically selected for you.
3. Then click the **Register** link that appears.
4. The **Apex Registration Wizard** appears and gives you the option of registering through the Internet, or manually. Click the **Manual Registration** option and click **Next**.
5. The wizard prompts you to enter your first and last names, and prompts you with the name assigned to this workstation. These items are used to help you manage which users and systems have your licenses in use. Complete the fields, then click **Print.**
6. Print the resulting document on your local printer and fax it to the number printed on the page. Service technicians then receive your fax and process your request, normally within a few hours. They then send you a registration code, either via fax, e-mail or by phone.
7. Once you have the code, return to the **Apex Registration Wizard** following steps 1-4 above and click the **Register** button.
8. Type the registration code you received into the field and click **OK**. The license is assigned and you should see a screen telling you how many licenses you have left. Click **OK** and you're done.

UnRegister Apex

Occasionally, you may find the need to release one of your legacy Apex licenses, freeing it up to be assigned to another system. You need to use this process if you're removing a computer from your environment or if an employee is leaving your company and taking their computer with them. There are two ways you can unregister Apex: by Internet and by fax.

Internet UnRegistration

1. From the Sketching settings in WinTOTAL Configuration Utility, click the **UnRegister** link in the **Legacy Sketching** section of the screen that appears.
2. Select the **Internet** option, and then click **OK**.
3. The wizard accesses the a la mode servers through the Internet, releases the license and updates your account. This license is now available to reassign on another computer.

Fax UnRegistration

If you do not have a connection to the Internet, you can still unregister Apex. However, you must notify a la mode so that your account can be updated. To unregister Apex by fax…

1. From the Sketching settings in WinTOTAL Configuration Utility, click the **UnRegister** link in the **Legacy Sketching** section of the screen that appears.

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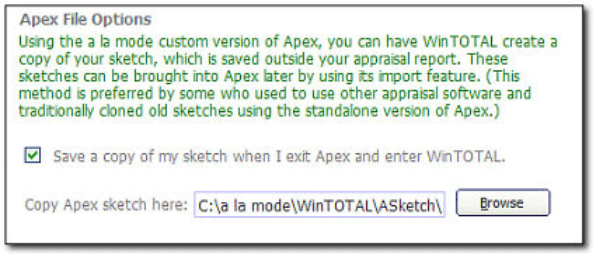
2. Select the **Manual** option, and then click **OK**.
3. Now, click **Print**, and fax the resulting document to a la mode. Once your fax is received, a technician will update your account.

Sketch Options

WinTOTAL's Apex configuration options allow you to set how WinTOTAL and Apex interact. You can set WinTOTAL to save an extra copy of your sketch to a folder outside of your report. To save a copy of your sketch outside of your report…

1. From the Sketching settings in WinTOTAL Configuration Utility, click **Apex File Options** in the **Sketch** pane on the left.
2. Check the box to enable this feature and then click **Browse**.
3. Locate the directory on your computer or network in which you'd like your sketches saved and click **OK**.


Apex File Options
Using the a la mode custom version of Apex, you can have WinTOTAL create a copy of your sketch, which is saved outside your appraisal report. These sketches can be brought into Apex later by using its import feature. (This method is preferred by some who used to use other appraisal software and traditionally cloned old sketches using the standalone version of Apex.)
Save a copy of my sketch when I exit Apex and enter WinTOTAL.
Copy Apex sketch here:
C:\a la mode\WinTOTAL\ASketch\
Browse

4. Click **Save** to put your changes into effect.

Enable Flood Maps

If you use a la mode's InterFlood product, you can configure WinTOTAL to automatically access your account and retrieve flood maps whenever you use the net.X features. You can also set certain defaults for how you'd like your flood maps to appear.

1. From the WinTOTAL Configuration Utility, click **Flood** in the toolbar at the top.

2. Type your InterFlood **Account Number** or your a la mode **Username** and **Password** in the fields at the top of the screen.
3. Designate whether you want WinTOTAL to automatically download only flood maps that fall in a flood zone or those geocoded with high confidence by marking the corresponding boxes.
   - **Optional:** You can also choose what type of map you want to download, and select what color you want the flood zones to be by using the drop down menus above the sample map.
4. Click **Save** when finished to put your configuration changes into effect.

Geocode Comps

Your comparables database is a valuable resource for your appraisal practice. Aurora has improved on the standard

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comps databases of the past by providing features that let you search for comparable properties based on physical location. Of course, this only works if the program knows where in the world the comps in your database are located. "Geocoding" is the process WinTOTAL uses to translate an address into a specific latitude and longitude. Once this information is obtained, the program can easily do proximity searches. To set up WinTOTAL's comps geocoding feature…

1. From the WinTOTAL Configuration Utility, click **Comps** in the toolbar at the top.

2. Mark the options you want to use for your geocoding preferences. Options are:
   - **Enable Scheduling** – Check this box to ensure that the geocoding information in your comps database is always up to date. Then, set the time and frequency that you'd like the WinTOTAL Assistant to scan your files.
   - **Geocode # Records at Each Run** - If you have a huge comps database, and you're concerned that the geocoding process might slow down your system, check this box to set a limit on the number of comps that get updated on each run. Then, enter a number of comps to geocode per run in the provided text box. Bear in mind, however, that when this process runs, only those comps that have not already been geocoded are processed. So once your system is up to date, subsequent runs complete much faster.
3. Click **Save** when finished to put your changes into effect.

Integrate with XSites

For files you need to keep in sync with your online products like Vault or your XSite, WinTOTAL includes a synchronization tool called "net.X Connect" that harnesses the power of our net.X technology to give you the fullest control over what is sync'd and what isn't. Whenever you update a report with new order information, change the internal status of a report, mark a report to send to the Vault, or make any other changes that require WinTOTAL to update information on your online accounts, WinTOTAL adds those changes to a queue that you can preview before the changes are posted to your online accounts.

Before you can harness the full power of net.X Connect, you'll need to configure it with your Username, Password, and preferred options. To access the net.X Configuration options:

1. From the WinTOTAL Configuration Utility, click **net.X** in the toolbar at the top.

2. Apply your changes and click **Save**.

Setting Up Your Username & Password

The first step to enabling the net.X Connect's powerful XSite integration tools is to supply WinTOTAL with your a la mode **Username** and **Password**. To do so:

1. Open the net.X configuration screen per the steps above if you have not already done so.

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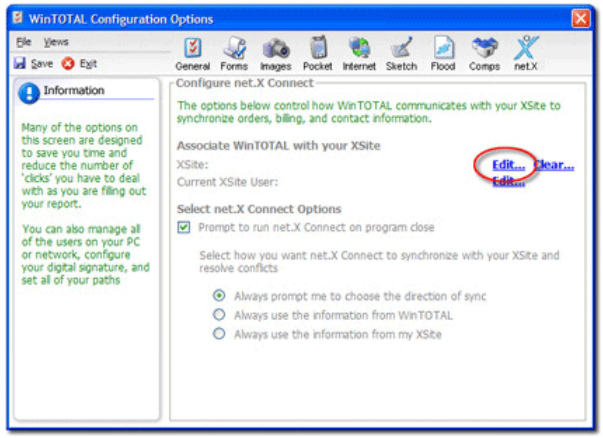
2. Then, click the **Edit** link to the right of the **XSite** field to enter your XSite **Username** and **Password**.


WinTOTAL Configuration Options
File Views
Save Exit
General Forms Images Pocket Internet Sketch Flood Comps net.X
Information
Many of the options on this screen are designed to save you time and reduce the number of 'clicks' you have to deal with as you are filling out your report.
You can also manage all of the users on your PC or network, configure your digital signature, and set all of your paths
Configure net.X Connect
The options below control how WinTOTAL communicates with your XSite to synchronize orders, billing, and contact information.
Associate WinTOTAL with your XSite
XSite:
Current XSite User:
Edit... Clear...
Select net.X Connect Options
Prompt to run net.X Connect on program close
Select how you want net.X Connect to synchronize with your XSite and resolve conflicts
Always prompt me to choose the direction of sync
Always use the information from WinTOTAL
Always use the information from my XSite

- Your XSite information is specific to your WinTOTAL user profile. The net effect is that network users can plug in their individual XSite logins so they only work with orders assigned to them.
- If you're a single user, mark the option to save your password. However, appraisers in a multi-user office may wish to leave that disabled, requiring password entry when WinTOTAL needs to talk to your XSite. (For convenience, WinTOTAL remembers until you close it.)
- If you're not the admin user for the XSite, the **Accounting and Order Management** option under XSite User Management must be enabled.

3. Click **OK** to save your information and then click **Save** to accept your new configuration.

Once you've correctly entered XSite information into WinTOTAL, WinTOTAL sends a signal to your XSite and enables the new "Business Management" features which replace the "Orders" interface we previously had.

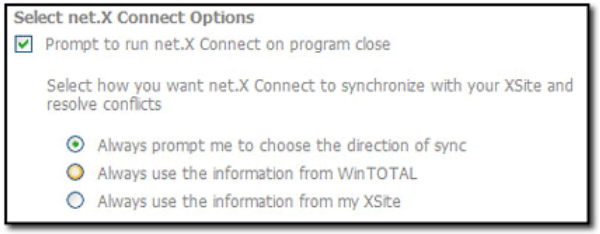
In the future if you need to change or remove XSite integration from WinTOTAL:

- Click **Clear** to remove WinTOTAL's XSite integration.
- Click the **Edit** link to the right of **Current XSite User** to tie your current user profile to a different profile on your XSite.

Configuring Sync Preferences

WinTOTAL allows you to specify how and when it synchronizes new and changed orders from your XSite. To change your net.X Connect configuration options.

1. Open the net.X configuration screen per the steps above if you have not already done so.


Select net.X Connect Options
Prompt to run net.X Connect on program close
Select how you want net.X Connect to synchronize with your XSite and resolve conflicts
Always prompt me to choose the direction of sync
Always use the information from WinTOTAL
Always use the information from my XSite

2. If you want WinTOTAL to automatically run net.X Connect so you can keep it up to date as you use it, you can mark the **Prompt to run net.X Connect on program** close option. This initiates the net.X Connect process any time you close WinTOTAL so you can keep WinTOTAL and your XSite up to date without having to remember to manually sync the two.
3. In the event that you synchronize an order that has different information in your XSite than in WinTOTAL, you're prompted to decide which data you want to use. Whenever this occurs you can merge in the data from the XSite order in one of three ways. Options are:
   - Always prompt me to choose the direction of sync
   - Always use the information from WinTOTAL

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- Always use the information from my XSite

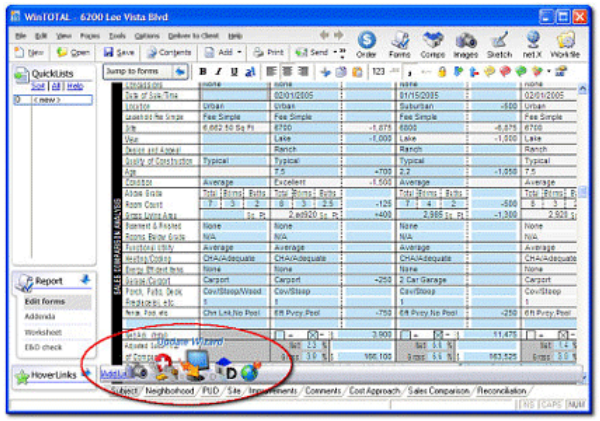
4. Mark the option for the method you want to use.
5. Click **Save** to update your changes.

Once you've configured net.X Connect, see the Synchronize WinTOTAL section in the Appraisal Desktop chapter of this user's guide to learn more about how to use it.

HoverLinks

Many are the times when you're working in a report in WinTOTAL and discover that you need to launch another application to retrieve data or check information. Perhaps it's an MLS service tool. Or a statistical analysis tool. Or even one of our supporting applications, like QuickPix.

While it's usually not too difficult to reach for the mouse, click the Windows Start menu, scroll up through the program options, wade through the sub-menus to find the desired application, and launch it, but we've got a better idea called "HoverLinks."



The **HoverLinks** pane appears in the lower left corner of all WinTOTAL PowerViews. Simply move your mouse pointer over the pane and a series of links pops up to the right. Click the desired icon to launch that applications or quickly jump to that section of WinTOTAL.

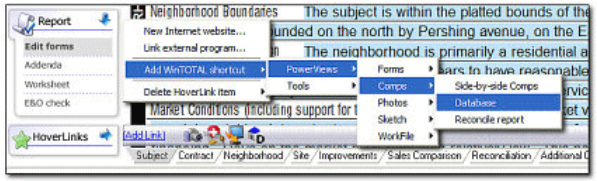
WinTOTAL HoverLinks

WinTOTAL allows you to create HoverLinks that link to two different portions of the program: PowerViews and tools.

Linking to a PowerView

To create a HoverLink to an entire WinTOTAL PowerView…

1. While in a report, move your cursor over the **HoverLinks** pane on the left and click **Add Link** in the menu that appears.
2. From the pop-up menu, select **Add WinTOTAL shortcut**.
3. Next, choose the **PowerView** option and select a PowerView that contains the section in WinTOTAL with which you'd like to link.
4. Finally, choose the section from the list that appears in the menu for that PowerView.



Linking to a WinTOTAL Tool

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To add a HoverLink that opens specific WinTOTAL tool…

1. Open a report in WinTOTAL.
2. Move your mouse pointer over the **HoverLink** pane on the left, and then click **Add Link**.
3. From the pop-up menu, select **Add WinTOTAL shortcut**.
4. Finally, choose the **Tools** option and select a tool that contains the section in WinTOTAL with which you'd like to link.

HoverLinks to Websites

To add a HoverLink to a website…

1. While in a report, move your cursor over the **HoverLinks** pane on the left and click **Add Link**.
2. From the pop-up menu, select **New Internet Website**.
3. In the **Add Web Site** screen, enter the **URL** for the desired site in the **Web Address** field.

Note: You do not have to use the http:// portion of the URL.

4. Enter a name for this site in the **Description** box, and then click **OK**.

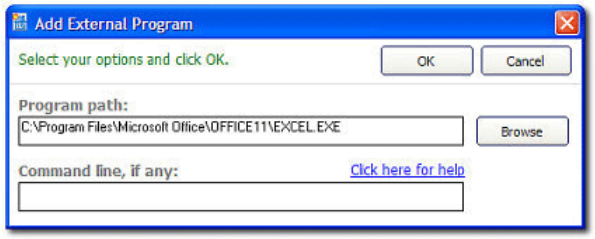
Add Web Site
A HoverLink can be assigned a static web address or it can help build an address using information from your report. For example, Hoverlinks could take you to the assessment data page for a given report's address. See how
OK
Cancel
First, enter the name you would like to see displayed over the hoverlink.
HoverLinks description:
a la mode's website
Now, provide the website address. If you want a dynamic address, click "Add field from report". WinTOTAL will add the selected field(s) from your report to your web address.
Website Address (i.e. www.alamode.com):
Add field from report
Test URL
www.alamode.com

Hint: If you're an advanced computer user, you can also take advantage of the **Add field from report** feature to dynamically pass parameters into the website URL so that the same link can work for several different appraisals.

HoverLinks to Programs

To add a HoverLink to an external program…

1. While in a report, move your cursor over the **HoverLinks** pane on the left, and then click **Add Link**.
2. From the pop-up menu, select **Link external program**.
3. In the **Add External Program** screen, click **Browse** and browse to and open the program file for your external program, then click **OK**.



Hint: If you're an advanced computer user, you can also take advantage of the **Command line** field to dynamically pass parameters to the program as you start it.

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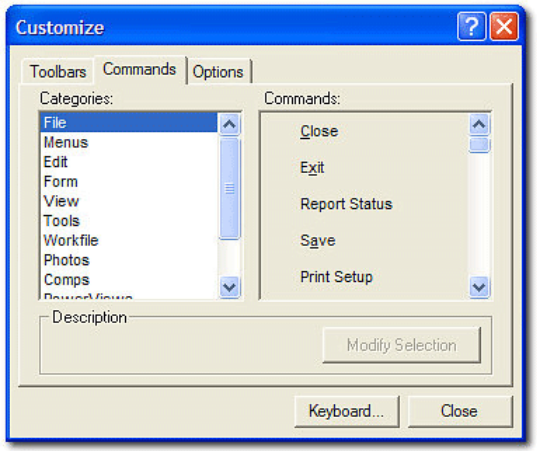
Customize Your Toolbars

Sometimes the best way to shave work time off of the average life of a typical report is to customize WinTOTAL so that your favorite functions are available with only one click. HoverLinks provide one way to do this, but if you prefer to update the main toolbars at the top of WinTOTAL, you can do that as well. To create a custom toolbar…

1. From either the **Appraisal Desktop** or **WinTOTAL**, right-click any toolbar you would like to customize and click **Customize** in the menu that appears.
2. In the screen that appears, click **New** in the **Toolbars**.
3. Type a name for your new toolbar and click **OK** to create it.
4. An empty toolbar titled with the name you specified appears on your screen. Click the **Commands** tab and simply drag and drop any of the available commands into the blank toolbar on your screen to build your custom toolbar.



5. Once you've added all of the menu items that you want in your custom toolbar, click its title bar, drag it to the current toolbars' location and drop it at a comfortable anchor point to replace the current active toolbar.

Hint: While you can drag and drop any of the primary menu items like the full **File**, **Edit**, and **View** menus into your custom toolbar, you may want to add only a portion of that menu into the custom toolbar. For instance, if you regularly use the copy and paste commands in WinTOTAL's **Edit** menu, you may want to consider adding just the **Copy** and **Paste** commands into your custom toolbar instead of adding the entire **Edit** menu to make them more easily accessible.

Toggle Custom Toolbars

If you decide to hide or show your toolbar at any time after you have completed it, simply right-click it and click the name of the toolbar you want to display/hide from the menu that appears. Alternately, if you are in the **Customize** screen while editing your custom toolbar and wish to display/hide it, simply click the **Toolbars** tab and check the box for the appropriate toolbar.

Appraisal Desktop Toolbars

Depending on whether you attempt to create a custom toolbar in the Appraisal Desktop or in WinTOTAL itself, WinTOTAL offers different functions for your custom

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toolbars. For instance, in the Appraisal Desktop, you can add buttons such as **New**, **Clone**, **Delete**, and **Print Report** to help you manage your reports. In the Appraisal Desktop, you can add items from any of the following categories to your custom toolbar:

- **File** – Contains commands to open any of your recently used appraisal files.
- **Workflow** – Contains the following items to improve your workflow:
- **New** – Creates a new report file in your File Cabinet
- **Clone** – Creates a new report file in your File Cabinet by cloning the report you currently have selected
- **Delete** – Deletes the report file you currently have selected in the File Cabinet
- **Print Report** – Allows you to print all or part of the currently selected report file in the File Cabinet to either a PDF file or to a hard copy
- **Mark Complete** – Mark an order as complete in WinTOTAL
- **Synchronize** – Synchronizes WinTOTAL with your XSite.
- **Rules -** Brings up the **Rules** screen that allows you to control your filter in the Appraisal Desktop's **Tracking** folders.

WinTOTAL Toolbars

While you may occasionally want to create new files, delete old report files or otherwise manage the reports in your File Cabinet from within the WinTOTAL window, the options available for your custom toolbar in the WinTOTAL window pertain more directly to those functions that facilitate report creation as opposed to report management. To improve and simplify your workflow as you create and manage your appraisal files WinTOTAL provides items from each of the following categories for use in your custom toolbars:

- **Menus –** Provides each of the full menus normally found in WinTOTAL for individual use in your custom toolbar.

Note: The Menus group actually contains the complete menus you normally find at the top of the screen.

- For separate commands within each menu or PowerView, simply click the appropriate category as listed below.
- **File –** Individual **File** menu commands
- **Edit –** Individual **Edit** menu commands
- **Form –** Individual **Form** menu commands
- **View –** Individual **View** menu commands
- **Workfile –** Individual **Workfile** PowerView specific commands
- **Photos** – Individual **Images** PowerView commands
- **PowerViews –** Individual commands to switch PowerViews
- **SendReport –** Individual report delivery commands
- **ShowQN** – QuickNotes display commands

Register WinTOTAL

When you first install WinTOTAL, you're prompted to enter the registration information to unlock WinTOTAL's full feature set. If you're working on a Demo version of WinTOTAL that you'd like to unlock, or if you need to change your

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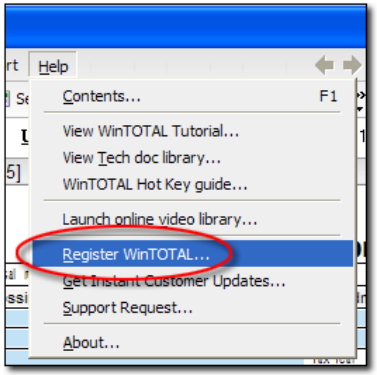
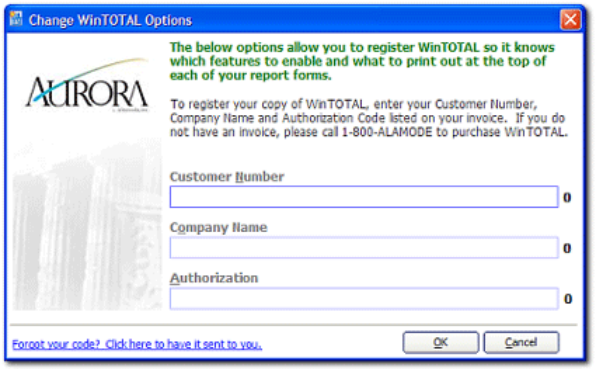
registration information you can do so at any time. To register WinTOTAL…

1. From anywhere in WinTOTAL, click the **Help menu** and select **Register**.



2. In the screen that appears, enter your **Customer Number**, **Company Name** and **Authorization code** in the designated fields. If you don't have this information, click the **Forgot your code?** link at the bottom of the registration screen. Enter your a la mode customer in the box and click the button. Your information is immediately sent to the e-mail address and fax number we have on file for your company.

3. Finally, click **OK** to accept your registration information.


Change WinTOTAL Options
The below options allow you to register WinTOTAL so it knows which features to enable and what to print out at the top of each of your report forms.
AURORA
To register your copy of WinTOTAL, enter your Customer Number, Company Name and Authorization Code listed on your invoice. If you do not have an invoice, please call 1-800-ALAMODE to purchase WinTOTAL.
Customer Number
Company Name
Authorization
Forgot your code? Click here to have it sent to you.
OK
Cancel

Set Up Your Office

WinTOTAL uses information about your office and its location to do a variety of things for you. Using your office's address information, WinTOTAL can retrieve directions to each property from your office and place those into the order. When invoicing, WinTOTAL uses your office contact information to help you fill out your invoice. Between these and other functions in WinTOTAL, it's imperative that you give WinTOTAL accurate information about your office to ensure a smooth experience throughout each report. To set up your office information…

1. In WinTOTAL, click **Options**, **Office Settings** from the menus.
2. Edit the information in any or all of the fields. For the **Federal Tax ID** and **Employee ID** fields, you have the option of having that information automatically transferred to your invoice forms. Check the box for either item to enable this feature.
3. If you want to integrate WinTOTAL with your XSite, you can do so here as well. Click **Edit** at the bottom of the screen, fill out your XSite login information, check the **Save Password** box for convenience, and then click **OK** to save your XSite information.
4. When you've completed your changes, click **OK** to save them.

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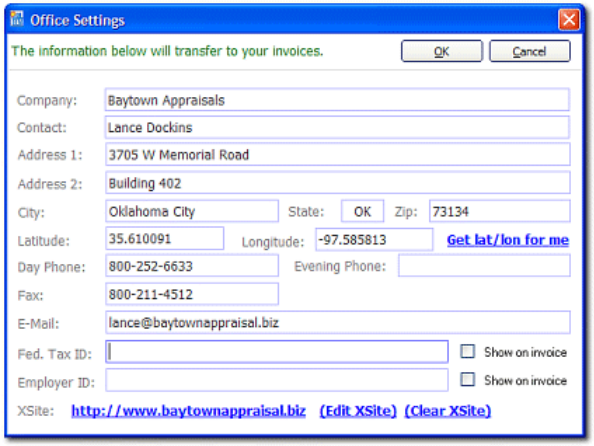
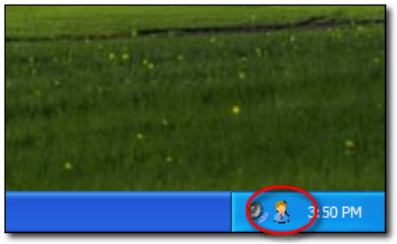


Automate WinTOTAL

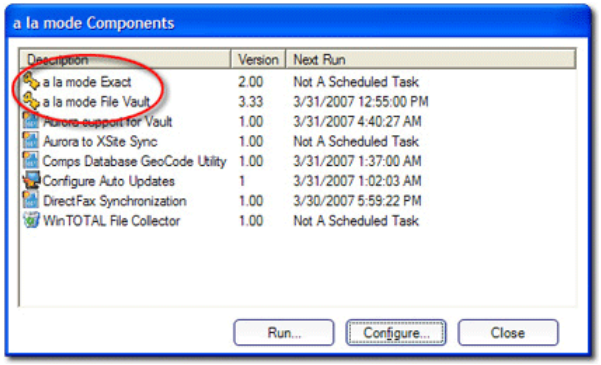
WinTOTAL comes complete with your own customizable task scheduler to help you automate those regular tasks like downloading updates, synchronizing WinTOTAL, sending data to the Vault, or managing photos on your computer. All of WinTOTAL's scheduling options are accessible through the Assistant that WinTOTAL installs into your Windows taskbar. Just double-click the Assistant icon or right-click it and choose **Show** from the menu to call up your scheduling options.



Schedule Vault & Exact Backups

If you've installed Vault & Exact side by side with WinTOTAL, you can schedule them to back up your reports and WinTOTAL settings on a regular basis through the Assistant. To do so…

1. Right-click the Assistant icon and click **Show**.
2. When the Assistant appears, double-click either the **a la mode Exact** or **a la mode Vault** entry to launch the configuration tools for those products. Then, just follow through the wizards that appear. For exact details on these processes, see the Vault user guide.


a la mode Components
Description
Version
Next Run
a la mode Exact 2.00 Not A Scheduled Task
a la mode File Vault 3.33 3/31/2007 12:55:00 PM
Aurora support for Vault 1.00 3/31/2007 4:40:27 AM
Aurora to XSite Sync 1.00 Not A Scheduled Task
Comps Database GeoCode Utility 1.00 3/31/2007 1:37:00 AM
Configure Auto Updates 1 3/31/2007 1:02:03 AM
DirectFax Synchronization 1.00 3/30/2007 5:59:22 PM
WinTOTAL File Collector 1.00 Not A Scheduled Task
Run...
Configure...
Close

Schedule XSite Synchronization

If you're actively using your XSite to take and manage orders electronically or if you're regularly using your XSite's business management tools, it's often useful to automate the synchronization process so that your XSite and WinTOTAL

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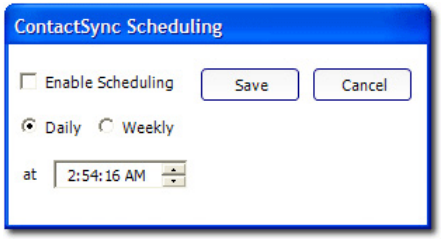
are always in tune with each other. To schedule the XSite synchronization process…

1. Right-click the Assistant icon and click **Show**.
2. When the Assistant appears, click to select **Aurora to XSite Sync**. Then, click **Configure**.

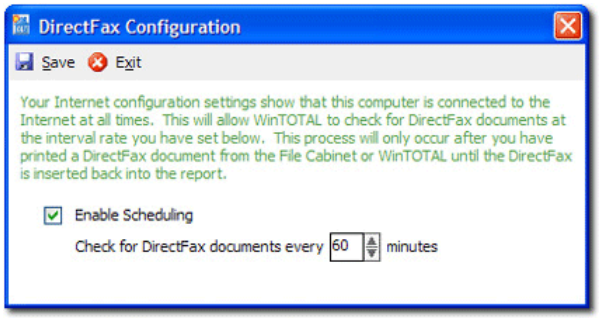


3. Check the box to **Enable Scheduling** for your synchronization and then indicate whether you want to synchronize on a daily or weekly basis by marking the corresponding option.
4. Select a time and day for your synchronization as necessary.
5. When finished, click **Save** to apply your changes.

Schedule DirectFax Synchronization

If you regularly use DirectFax to archive items into your digital workfile or if your clients use it to send you pertinent information for your appraisal work, you can automate the synchronization process so that WinTOTAL always has the latest DirectFax items. To do so…

1. Right-click the Assistant icon and click **Show**.
2. When the Assistant appears, click to select **DirectFax Synchronization**. Then, click **Configure**.


DirectFax Configuration
Save
Exit
Your Internet configuration settings show that this computer is connected to the Internet at all times. This will allow WinTOTAL to check for DirectFax documents at the interval rate you have set below. This process will only occur after you have printed a DirectFax document from the File Cabinet or WinTOTAL until the DirectFax is inserted back into the report.
Enable Scheduling
Check for DirectFax documents every
60
minutes

3. Check the **Enable Scheduling** box and indicate how often you want WinTOTAL to synchronize your DirectFax items by typing a number (in minutes) into the provided box.
4. When finished, click **Save** to apply your changes.

Schedule File Cleanup

As you continue to use WinTOTAL to build your appraisal reports, you may accumulate a number of backup reports called "BZ1" files along with a host of old images. To help you maintain as much free hard drive space as possible, WinTOTAL provides a simple tool, the File Collector, you can configure to automatically flush the old backup reports and images from your system. To set it up…

1. Right-click the Assistant icon and click **Show**.
2. When the Assistant appears, click to select **WinTOTAL File Collector**. Then, click **Configure**.

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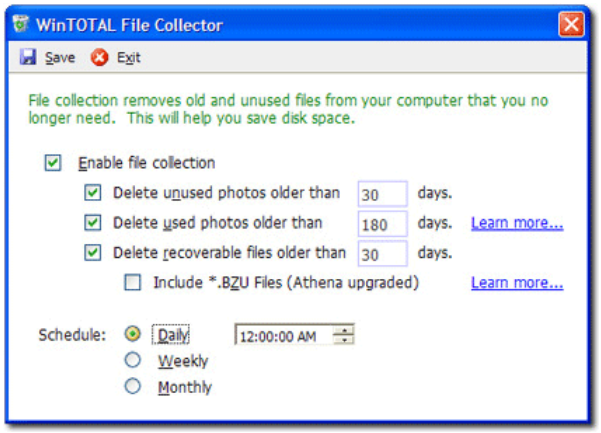
WinTOTAL File Collector
Save
Exit
File collection removes old and unused files from your computer that you no longer need. This will help you save disk space.
Enable file collection
Delete unused photos older than 30 days.
Delete used photos older than 180 days. Learn more...
Delete recoverable files older than 30 days.
Include *.BZU Files (Athena upgraded) Learn more...
Schedule:
Daily
12:00:00 AM
Weekly
Monthly

3. Check the **Enable File Collection** box.
4. Check the boxes beside each type of file you wish to clean out of your system automatically and then indicate the age (in days) that each item must be before WinTOTAL should clean it from your system. Options are:
   - **Unused Photos –** Photos in your images database that you have not yet used in a report
   - **Used Photos –** Photos in your images database that you've already used in a report. Bear in mind that wiping these "used" images from your computer DOES NOT remove them from the reports in which you used them.
   - **Recoverable Files –** WinTOTAL keeps backup copies, called "BZ1" files, of every report you create. Once you complete a report, these files become unnecessary and you can safely remove them from your computer.
   - **Athena Upgraded Files –** When you upgrade from Athena to Aurora, WinTOTAL creates backup copies of your original Athena reports. If you've seen no problems upgrading from Athena to Aurora, you need not keep these backup copies, called "BZU" files, around.
5. Finally, indicate the frequency with which you want WinTOTAL to flush out old files. As necessary, schedule a time of day, week, or month for the cleanup process to run.
6. When finished, click **Save** to apply your changes.

Appraisal Desktop

The Appraisal Desktop is WinTOTAL's central management point. To open the Appraisal Desktop, click **Start**, **[All] Programs**, **WinTOTAL**, **Appraisal Desktop**. From here you can:

- Organize your report files into folders for easy retrieval
- Quickly locate existing reports using powerful search tools
- Identify the state of the reports using the handy "stop light" icons
- Update the internal status of any report
- Print your report
- Send a report to the Vault for backup or to share with other appraisers
- Update the order form for any report
- Add electronic documents to the report's digital workfile
- Fax documents directly into your workfile
- Record payments for any order, or export information directly to QuickBooks

In addition, the Appraisal Desktop is used to update your contacts and to work with TOTAL for Mobile.

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Report Management

The **Files** PowerView, often called the "File Cabinet," is designed to help you organize and access your appraisal files. The screen is divided into two major sections: the folders list on the left and the files on the right.

Folders

- The top part of the folders section, the **Files** pane, allows you to sort your report files into logical "file folders" for easy retrieval.
- At the bottom of this section, the **Tracking** folders organize your reports from an internal status perspective, showing you at a glance how any reports are in progress, past due, pending review, or several other options.

Files

The files section on the right provides more details about each report.

- Clicking a report opens a Detailed View which displays the report's internal status history, as well as the date of key events.
- The Detailed View also allows you to deliver, print, or mark your report as paid, among other things.
- At the bottom of the **Files** view, a series of tabs allows you to edit and review even more information about each report.

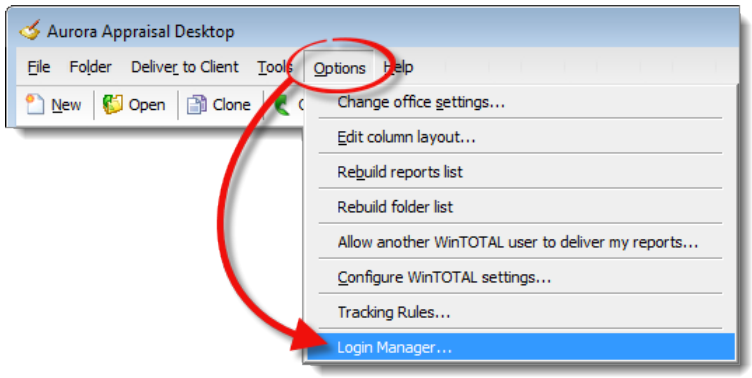
To access the **Files** PowerView, open the Appraisal Desktop and click **Files** in the upper right corner of the screen.

Login Manager

TOTAL Connect's Login Manager allows you to link TOTAL Connect with your client's account. Once you've logged in and verified your account information, TOTAL Connect will download and display any orders you've accepted via your client's order management portal when you download new and changed orders using net.X connect.

Follow the instruction below to link TOTAL Connect with your client's account:

1. From TOTAL Connect's Appraisal Desktop, click **Options** on the upper left, and select **Login Manager** from the drop-down menu.



2. If prompted, sign in to TOTAL Connect using your a la mode login.

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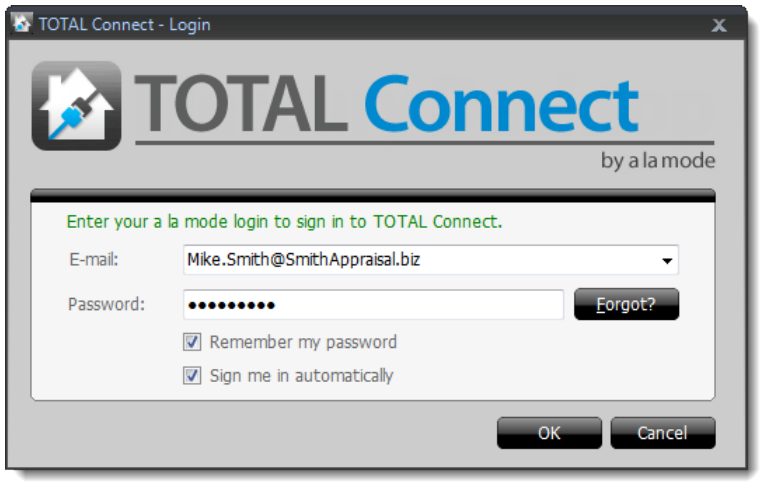
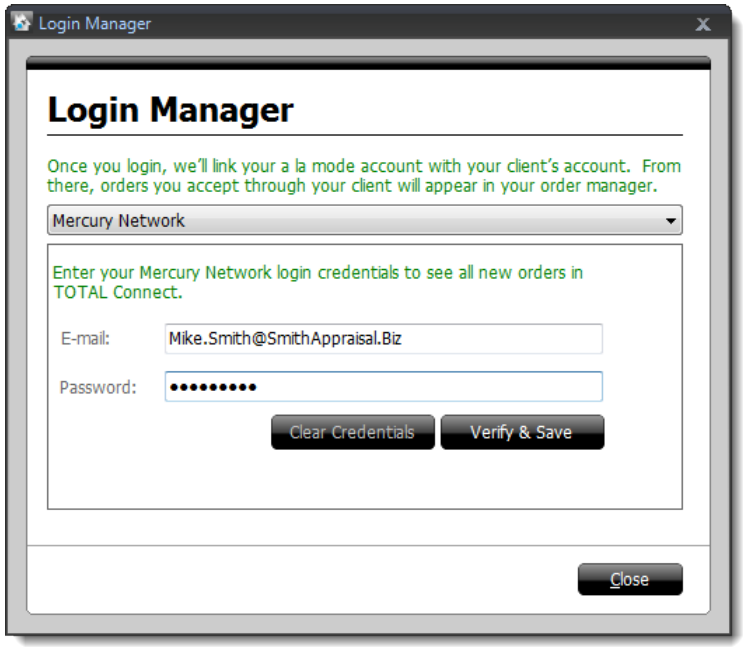


3. In the screen that appears, select your client from the drop-down menu. Then, enter your e-mail address (or username) and password.


Login Manager
Login Manager
Once you login, we'll link your a la mode account with your client's account. From there, orders you accept through your client will appear in your order manager.
Mercury Network
Enter your Mercury Network login credentials to see all new orders in TOTAL Connect.
E-mail:
Mike.Smith@SmithAppraisal.Biz
Password:
Clear Credentials
Verify & Save
Close

4. Once you've selected your client and entered the login information for your client's portal, click **Verify & Save**.
5. To remove an existing user and/or log in with a different account, click **Clear Credentials**. Then, enter the new login information and click **Verify & Save**.
6. When you're finished, click **Close**.

That's it! Once you've linked your accounts, TOTAL Connect downloads any new orders you accept from your client's portal when you download new and changed orders using net.X connect. Keep in mind that an order must be accepted from your client's order management portal before it will be downloaded and displayed in TOTAL Connect.

Organize Reports

To help you reach your optimum performance, WinTOTAL's Appraisal Desktop includes a host of file organization tools. In addition to the standard file folder approach, WinTOTAL also includes self-managing folders called "Tracking" folders, full control over the data columns that appear, and tracking rules that allow you to filter the list of reports that appear.

- Top-level folders are displayed along the left, with sub-folders nested beneath them.
- If a folder has sub-folders, they are shown with a plus next to them.
- Clicking the plus expands the folder and displays any sub-folders.
- You can create as many of the manila folders as you like in WinTOTAL

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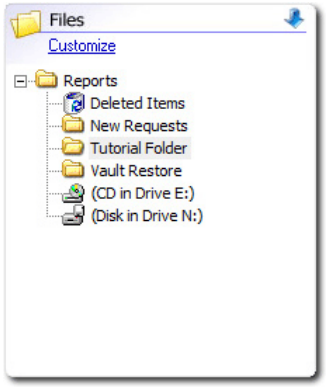

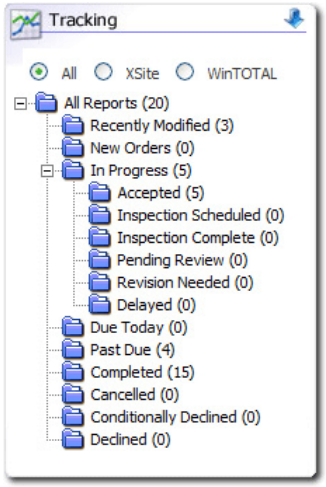

Create Folders

WinTOTAL allows you to create as many manila folders as you need to effectively organize your files. Since the "tracking" folders come with WinTOTAL and are designed to manage themselves, you need not create any additional tracking folders or try to manually place your files into those folders. They take care of themselves. To create a new manila folder…

1. In the Appraisal Desktop, click the folder in the **Files** pane into which you want to add your new folder or, if you're creating a new top-level folder, click the Reports folder.
2. Right-click the folder and click **New** in the pop-up menu that appears. Or, click the **Customize** link located in the **Files** pane, followed by **New**.
3. In the available box, type the name for your new folder and click **OK**.

Your new folder now appears in the folder list. From here you can:

- Delete a folder by right-clicking it and choosing **Delete** or clicking the **Customize** link in the **Files** pane and clicking **Delete** in the menu that appears.
- Rename a folder by right-clicking it and choosing **Rename** or clicking the **Customize** link in the **Files** pane, clicking **Rename** in the menu that appears, typing a new name into the box, and clicking **OK**.

Edit Your Column Layout

The Appraisal Desktop provides an easy way for you to customize the columns you see in the Files view. By customizing the column layout in the Files view, you can reduce the number of times you have to open a report just to look up some information about it, like the amount due on the report. To change the items displayed in the file list…

1. From the Appraisal Desktop, right-click anywhere in the file list and choose **Edit column layout**.
2. Select the desired information from the **Available Fields** pane on the left. Double-click the item to add it to the **Displayed Fields** list, or just click **Add**.

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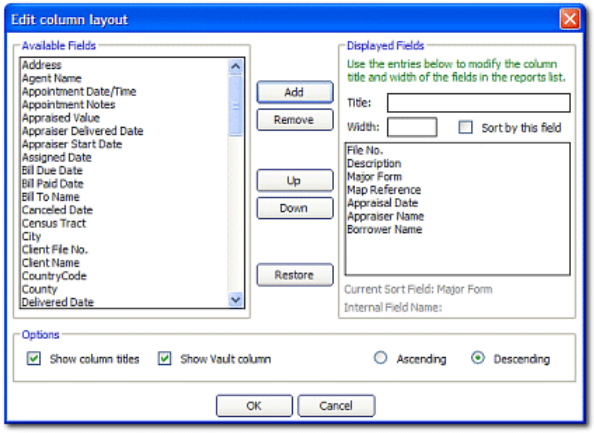


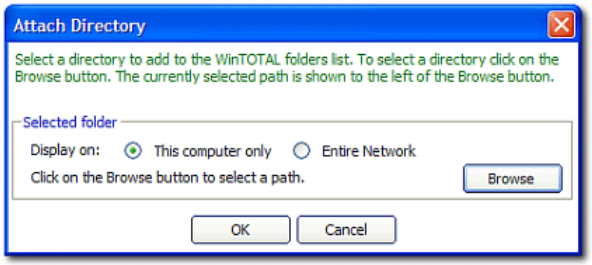
3. To remove a field, double-click it in the **Displayed Fields** list, or select it and click **Remove**.
4. Use the **Up** and **Down** buttons to re-position the fields in the list.
5. If desired, select an item in the **Displayed Fields** list and enter a new title for the column in the **Title** box.
6. Set the initial width of the column by adjusting the number in the **Width** field.
7. Click **Sort by this field** if this is the field by which you'd like to initially sort your reports.
8. Set the initial sort direction to **Ascending** or **Descending** by selecting the appropriate option in the **Options** box.
9. If you'd prefer not to see the column headings, un-check the **Show column titles** box.
10. Click **OK** to save your settings.

Once your column layout is set, you can modify the column order and width by clicking and dragging the title header of the column. Likewise, you can resort the list by clicking the title header of any column.

Attach External Folders

You can also create a folder that opens an external storage drive or mapped directory. This allows you to access WinTOTAL reports on shared storage devices like networks or CDs. To map an external directory:

1. From the Appraisal Desktop, choose **Folder**, **Attach Directory** from the menus.


Attach Directory
Select a directory to add to the WinTOTAL folders list. To select a directory click on the Browse button. The currently selected path is shown to the left of the Browse button.
Selected folder
Display on:
This computer only
Entire Network
Click on the Browse button to select a path.
Browse
OK
Cancel

2. Decide if you'd like this external directory to appear to all WinTOTAL users or just yourself.
   - Mark **This computer only** to limit access to the new directory to yourself.
   - Mark **Entire Network** to allow any user who accesses your copy of WinTOTAL — either over a local area network or by logging into the same machine — to see the directory.
3. Click **Browse**, select the desired directory from the directory list and click **OK**. You can choose either a directory on your local computer, a mapped drive on your network or an external storage device attached to your system.
4. When prompted, type a name for your attached directory and click **OK**.

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The new directory is now displayed in your folder list.

Note: If you've linked to a network drive, make sure you've logged into the network before you click on the attached directory in your folder list to avoid an error message. Likewise, if you've attached to an external storage device, ensure that a disc, CD or storage card is properly inserted.

- To remove an attached directory, right-click it and choose **Disconnect** from the pop-up menu.

Tracking Folders

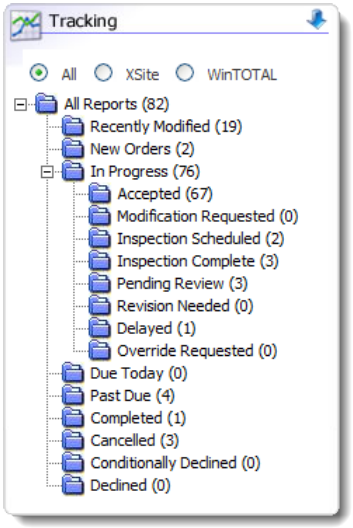
In the Appraisal Desktop, the lower portion of the **Folders** section displays the "Tracking" folders, which automatically sort and display your reports based on their internal status. By comparison with regular folders, Tracking folders operate quite a bit differently. Some of the differences include:

- **Report Organization –** The reports in the Tracking folders are the exact same reports you have in your regular folders. They've simply been reorganized to provide a window into the current internal status of your office.
- **Report Management –** Unlike regular folders, you can't move reports into a Tracking folder. Tracking folders are self-managing so the reports move themselves to the appropriate folder as you continue working with them. While there are several different criteria that the Tracking folders use, one common way you can move a file from one folder to the next is by changing its internal status.
- **Overall Report Data –** To help you get an accurate picture of your office, WinTOTAL totals the number of reports in each Tracking folder and displays the total to the left of each Tracking folder.

To use your Tracking folders:

1. First, set up your Tracking Rules to filter out unwanted reports.
2. Then, in the Appraisal Desktop, click any Tracking folder in the lower left corner of the screen.
3. Click a Tracking folder to display reports with the related internal status. If you need to limit this list to a subset of files you have three options:

- To limit the list of files to those that also exist as orders on your XSite, mark the **XSite** option.
- To limit the list of files to those that only exist in WinTOTAL, mark the **WinTOTAL** option.
- To show all the files in your File Cabinet regardless of whether they are XSite or WinTOTAL files, mark **All**.



Set Up Tracking Rules

If you plan to actively use WinTOTAL's Tracking folders to help you keep track of your files, you must first take a few

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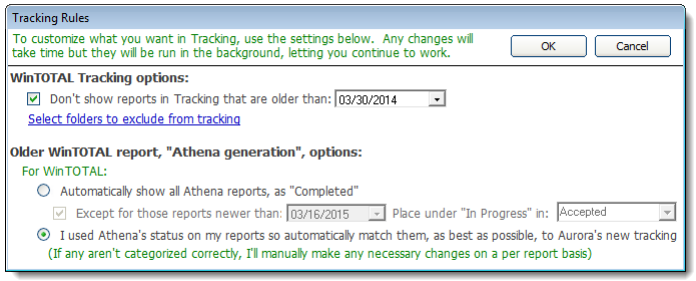
moments to define the list of reports you want to handle with those Tracking folders. To do so:

1. In the Appraisal Desktop, click **Options**, **Tracking Rules**.


Tracking Rules
To customize what you want in Tracking, use the settings below. Any changes will take time but they will be run in the background, letting you continue to work.
OK
Cancel
WinTOTAL Tracking options:
Don't show reports in Tracking that are older than: 03/30/2014
Select folders to exclude from tracking
Older WinTOTAL report, "Athena generation", options:
For WinTOTAL:
Automatically show all Athena reports, as "Completed"
Except for those reports newer than: 03/16/2015
Place under "In Progress" in: Accepted
I used Athena's status on my reports so automatically match them, as best as possible, to Aurora's new tracking
(If any aren't categorized correctly, I'll manually make any necessary changes on a per report basis)

2. In the screen that appears, mark your preferred options to limit the list of reports that appear in your Tracking folders. Options are:
   - **WinTOTAL Tracking Options –** These Tracking options allow you to filter your report list to just those files that fall after a certain date and reside within certain folders. Click the **Select folders to exclude from tracking** link and check the box beside each folder you want to filter out of tracking.
   - **Older WinTOTAL Report, "Athena generation", options –** If you've been using WinTOTAL for some time, it's likely that you have some of the older Athena format reports throughout your File Cabinet. Depending on how long it's been since you upgraded to Aurora, it's possible that some of those reports are still active. These options help you gracefully handle those old reports in your Tracking folders. You have two options:
     - Check the **Automatically show** option to place all Athena files in your "Completed" **Tracking** folder. If you need to refine the filter to ensure that active reports aren't filtered out, check the **Except for** box, and specify a cutoff date and status to classify the newest Athena reports under a status other than "Completed."
     - If you were diligent about using Athena's status tools, you can select the **I used Athena's status on my reports** option and WinTOTAL will use your previous status information to sort your reports in Tracking.

3. When you're finished, click **OK**.

Rebuild Your Reports List

If you regularly add files into your WinTOTAL file folders outside of WinTOTAL or experience other difficulties with files in the Appraisal Desktop, WinTOTAL's file list could become corrupt. If this occurs, your File Cabinet may not reflect all of the files that are actually available in your WinTOTAL file folders. For such occasions, WinTOTAL provides a simple utility you can use to restore your file list to its full inventory again. To use it, click **Options**, **Rebuild Reports List** in the Appraisal Desktop. WinTOTAL then scans through the folders in your WinTOTAL installation and builds a list of all current reports in your File Cabinet.

Note: You should only need to use this feature on very rare occasions, normally only if directed to do so by an a la mode tech support representative. If you find that you're regularly using this function, contact one of our support technicians for further assistance.

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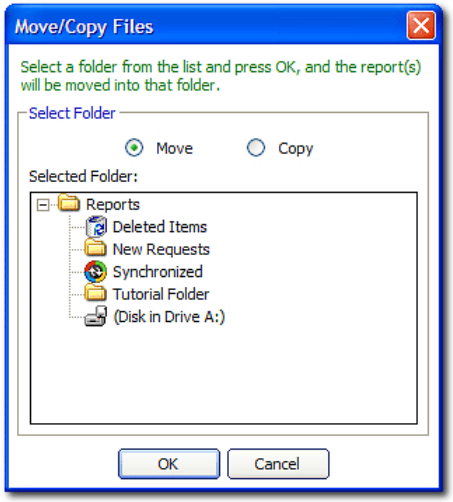
Work with Reports

Appraisal reports found in the File Cabinet can be moved, copied or renamed as needed from within the Appraisal Desktop.

- **Creating New Reports –** You can create a new report in one of two ways.
  1. Click **New** to create a new report from scratch.
  2. Click Clone to create a new report based off an exact copy of another report in your File Cabinet.

- **Selecting Reports** – To select a file in the files list, simply click it. You can also select multiple files by holding down the **Ctrl** key on your keyboard and clicking multiple files. Or, select a whole range of files by clicking the first file in the range, scrolling down to the end of the list, holding down the **Shift** key and clicking the last file in the range. All files between the two ends are then selected.

- **Copying Reports** – Select the report or reports you wish to copy in the files list. Right-click and choose **Move or Copy to** from the pop-up menu. Mark the **Copy** option and then choose the new folder you'd like to contain the new report and click **OK**.



- **Moving Reports** – The simplest way to move a report from one folder to another is to simply click a file and drag it to the desired folder. You can also select multiple files and drag them all at once. Or, you can select one or more files, then right-click and choose **Move or Copy to** from the pop-up menu. Mark the **Move** option and then choose the new folder you'd like to contain the new report and click **OK**.

- **Renaming Reports** – To rename a file, select the file (you can only select one), then right-click and choose **Rename** from the pop-up menu, or click the **Rename** button in the toolbar. In the available box, type the new name for your file and click **OK**.

  Note: Renaming a report from the Appraisal Desktop changes both the file's description and the name of the .ZAP report file on your hard drive.

- **Deleting Reports** – Select the report or reports you wish to delete in the files list and drag them to the **Deleted Items** folder on the left. Alternately, you can right-click

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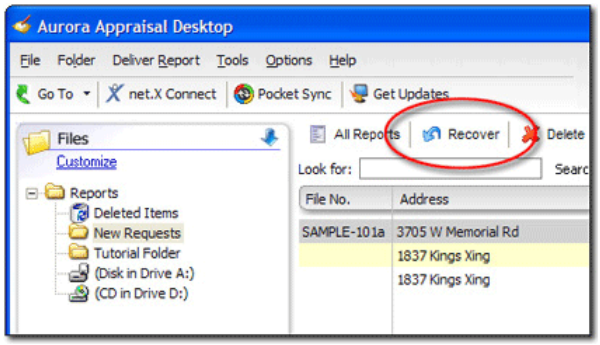
and choose **Delete** from the pop-up menu, or click the **Delete** button in the toolbar.

- **Restoring Deleted Reports** – Whenever you delete a file from the Appraisal Desktop, it is placed in the **Deleted Items** folder. If you delete a file by accident, click the **Deleted Items** folder on the left and then drag the desired file or files to another folder.
- **Recovering Reports** – As you work on your reports, WinTOTAL automatically saves backup copies of your files as .BZ1 files on your hard drive. If something happens to your file, you may be able to recover it from this backup. Click any folder, then right-click and choose **View Recoverable Files** from the pop-up menu, or choose it from the **Options** menu. All .BZ1 files located in that directory are displayed. Double-click any desired report to recover that file. Or, right-click it and choose **Recover** from the pop-up menu. The backup file is renamed to an active report and is displayed in the folder with the text "recovered" added to the file description.



Search for Reports

Sometimes the easiest way to find the right report is to perform a basic report search. The Appraisal Desktop provides three different ways for you to search for the reports you need:

- Performing a basic (simple) search
- Performing a complex (advanced) search
- Searching for a report by its location.

Simple Find

The simple or "basic" find tool provides a quick way to locate reports by searching through your files for a certain phrase. As you use the simple find tool, keep in mind that it searches through all fields in your report, so a search for "123" may bring up reports with an address of "123" and with a Map Reference number containing "123." To use the simple find tool…

1. In the Appraisal Desktop, type a search phrase into the **Look for** field above the file list.
2. Select the folders you'd like to look in from the **Search In** list.
3. Click **Find Now** to display the results.
4. Click **Clear** to reset your search criteria and display all of your files.

Advanced Find

The advanced find tool helps you get around the limitations of WinTOTAL's basic find. With advanced find, you can

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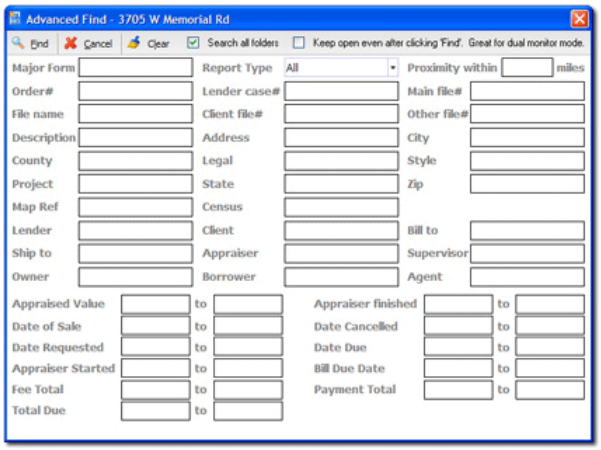
combine a series of fields together into a very specific search or you can just ensure that your search for "123" limits results to those containing "123" in the address field. To use the advanced find tool…

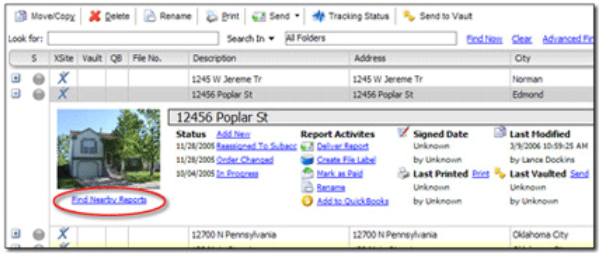


1. In the Appraisal Desktop, click **Advanced Find** in the upper left corner of the screen.
2. In the screen that appears, type as many individual search phrases into the provided boxes as you like. The more search phrases you type, the more WinTOTAL refines your final search results.
3. To expand your search beyond the currently selected folder, click the **Search all folders** box.
4. If you're going to perform multiple searches, you may keep the **Advanced Find** screen open even after you execute one search. Click the box at the top of the screen.
5. To limit the list of reports to those that involve subject properties within a certain distance from the selected property noted in the header of the screen, type a distance into the **Proximity within** field.
6. Once you're satisfied with your search criteria, click **Find**.
7. If no reports are found that match your criteria, no reports appear, otherwise you see all the reports that match your criteria in the **Files** list.
8. Click **Clear** at the top of the list to reset the search criteria and display all reports.

Location Search

As you continue to work up new reports, WinTOTAL keeps track of the latitude and longitude it finds for each new subject property. Over time, this can assist you in finding suitable reports that you can use to merge in relevant report data or flag as potential comps for a new report. If you want to find a series of reports within a certain distance of another report…

1. In the Appraisal Desktop, click to select a report around which you'd like to find properties.
2. If the detailed view does not expand automatically, click the **+** symbol to the left of the report to open it.
3. Click the **Find Nearby Reports** link and choose a proximity from the pop-up list to limit your reports list to those within the desired area.



Hint: Alternately, you can right-click the file and choose **Search within ½, 1, or 5 miles** from the menu that appears.

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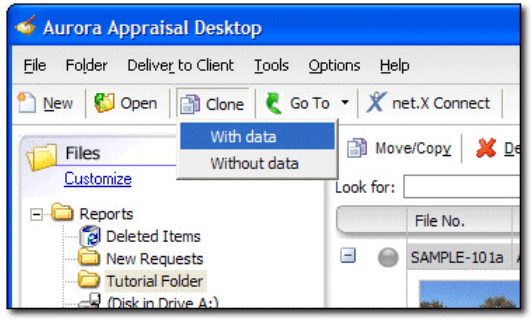
All reports within your specified radius then appear in the reports list on the right. Click **Clear** at the top of the list to reset the search criteria and display all reports.

Clone Reports

If you'd like to start a new report, based on the contents or structure of an existing report, you can use WinTOTAL's Clone tool to help you do so. To clone a report…

1. In the Appraisal Desktop, locate the report you wish to clone and click to select it.
2. Click **Clone** in the toolbar, and choose whether to clone the report **With data** (copies the entire report, along with all the information, maps, photos, sketches, comps and other items in place) or **Without data** (copies the structure of the report, including all forms and addenda, but without any information, maps, photos, sketches, comps or other items).



3. Your new report is opened in the **Order** PowerView of WinTOTAL. Give this new report a description and click **Save.** You're now ready to complete the report.

Print Reports

While you can always print a report while it's open in WinTOTAL, you can also print a report directly from the Appraisal Desktop without having to open the report first. But unlike WinTOTAL's usual print options, by printing through the Appraisal Desktop, you can print a full reports list in your File Cabinet or quickly move from report to report printing out entire copies or just a series of invoices. To use the Appraisal Desktop's print feature…

1. In the Appraisal Desktop, find and click to select a report you wish to print.
2. Click **Print** in the toolbar and mark your desired print option in the screen that appears. Options are:
   - **Print Report** – Choosing this option opens the standard WinTOTAL Print screen, from which you can choose which pages and forms you'd like to print, as well as choosing the printer to which you'd like them sent.
   - **Auto print report** – This option automatically prints the report based on the default settings you've chosen for that report in the past.
   - **Print invoice only** – If you just need to send out a new invoice, choose this option. Any invoice form found in the report is sent to your default printer.
   - **Print reports list** – The final option doesn't print the actual report. Instead, it prints a list of all reports in the current folder.
3. Click **OK** to accept you print option.

WinTOTAL immediately prints the items you specified. For further details on WinTOTAL's advanced printing features, see the Printing chapter of this user's guide.

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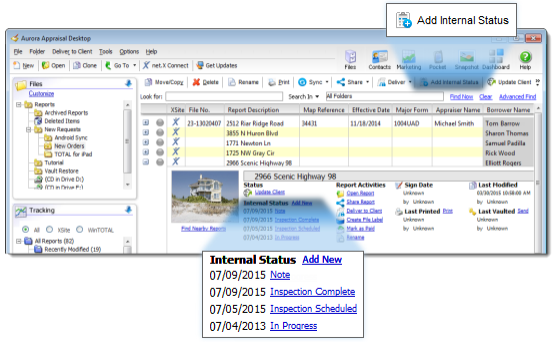
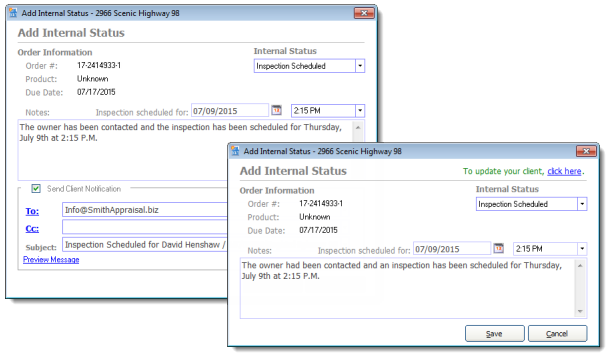
Set Report Status

WinTOTAL's status management tools can be a great way to track your office turnaround times, generate a snapshot of your current workload, and even organize your files. But when you couple WinTOTAL's internal status management tools with your XSite, they become a proactive status message tool you can use to keep your clients up to date about the status of their orders without also tying up your time in lengthy phone calls. To use WinTOTAL's status tools:

1. In the Appraisal Desktop, click to select the report you wish to update.
2. Depending on your preferred workflow, you then have two options.
   - Click the **Add Internal Status** button in the top toolbar.
   - Click the plus sign beside your selected report to open the Detailed View and then click the **Add New** link at the top of the internal status list.

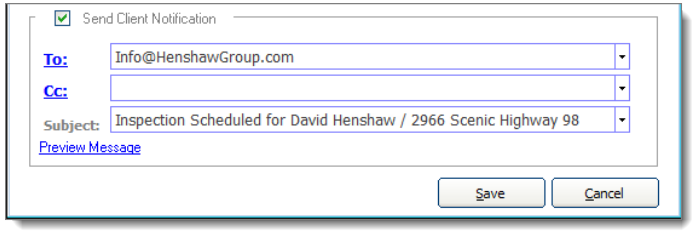


3. When the **Add Internal Status** window appears, choose the desired internal status from the drop-down list in the upper, right corner. Depending on the status you select, more options may appear. For instance, if you choose Inspection Scheduled, additional fields appear where you can enter the date and time of the scheduled inspection.
4. Type any comments you want to include with the status change in the **Notes** box.



> **Note:** If you're using WinTOTAL's status tools in conjunction with your XSite so that you can benefit from proactive status messages, the **Notes** field becomes the body of the status notice e-mail.

5. If this is an XSite order and you've integrated with your XSite, check the **Send Client Notification** box to send a notification of this status change to your client. Then, use the drop-down menus to select a recipient and subject for your message or just type that information yourself.



6. When you're finished, click **Save** to update your internal status.

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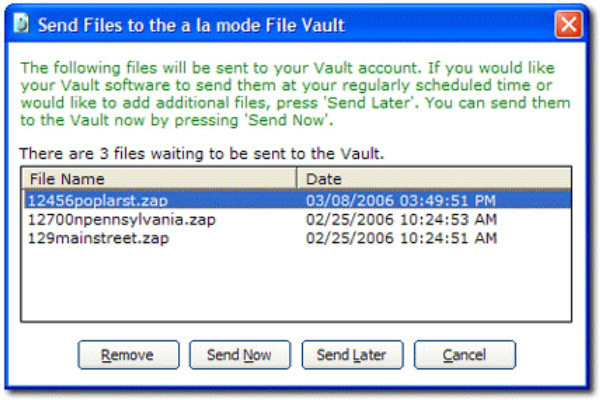
Send Reports to Vault

The Vault is a utility that allows you to store your files in a secure online repository for backup purposes, or to share files with your colleagues. While this tool can monitor your system and automatically upload any modified files on a regular basis, you can also send files to the Vault manually from the Appraisal Desktop.


Send Files to the a la mode File Vault
The following files will be sent to your Vault account. If you would like your Vault software to send them at your regularly scheduled time or would like to add additional files, press 'Send Later'. You can send them to the Vault now by pressing 'Send Now'.
There are 3 files waiting to be sent to the Vault.
File Name
Date
12456poplarst.zap
03/08/2006 03:49:51 PM
12700npennsylvania.zap
02/25/2006 10:24:53 AM
129mainstreet.zap
02/25/2006 10:24:51 AM
Remove
Send Now
Send Later
Cancel

1. From the Appraisal Desktop, select any file (or multiple files) in the file list and click the **Send to Vault** button in the toolbar.
2. Confirm the list of files to be sent and click:
   - **Remove** – to delete these files from your Vault.
   - **Send Now** – to immediately connect to the Internet and send the selected files.
   - **Send Later** – to queue up these files in the net.X Connect queue to be sent the next time your system connects to the Vault.
   - **Cancel** – to cancel this operation.

Report Views

As you continue using the Appraisal Desktop, you may find it useful to see or edit information in your report without taking the time to open it, search for it, unsign it, save it, and so on. WinTOTAL's **Files** PowerView provides an alternate method of viewing and updating your data on-the-fly to help you save time. These powerful tools, called "views," are controlled by the tabs appearing across the bottom of the screen. Available tabs include:

- **All Files**
- Order Form
- Workfile
- DirectFax
- E & O
- History

In addition, WinTOTAL provides a detailed view you can use to look up detailed information about the report, print it, send it to QuickBooks, deliver it, or label it.

Detailed View

WinTOTAL's detailed view can give you insight into the current status of each report in your File Cabinet and can help you perform a number of basic report management functions without even opening the report. To open the detailed view of any report, simply click the plus sign beside any report in the Appraisal Desktop.

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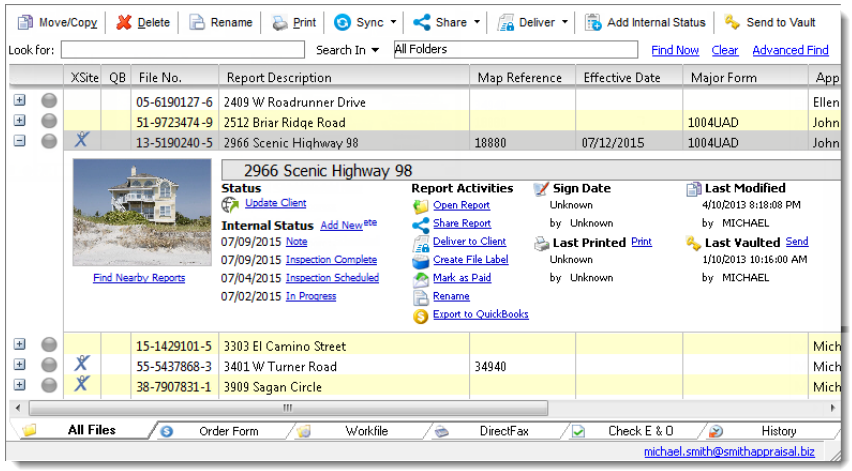
The detailed view provides extensive report information including:

- Front Subject Photo (if one has been assigned in the report)
- Internal Status History
- Last Signed Date and by whom it was signed
- Last Printed Date and by whom it was printed
- Last Vaulted Date and by whom it was sent to the Vault
- Last Modified Date and by whom it was modified



For convenience, you can also use the detailed view to perform a number of basic report management functions including:

- Deliver the report
- Create a file label for the report
- Mark the report as "Paid."
- Rename the report
- Add the Report to QuickBooks

Note: The "Add Report to QuickBooks" option only appears if you have QuickBooks installed on your computer.

---

i) Disabling Auto-Expand

By default, whenever you click on a file, it expands to display the file's detailed view. If you'd rather control this expansion yourself, click the **Tools** menu in the Appraisal Desktop, then de-select the **Enable auto-expand** option to disable it. If you chose to re-enable it at a later time, simply return to the **Tools** menu and check the **Enable auto-expand** option again.

Order Form View

WinTOTAL's File Cabinet provides you with direct access to each report's order form so that you do not have to open each report to update basic order or billing information. To access a report's order form…

1. In the Appraisal Desktop, click to select a report in the files list. Then, click the **Order Form** tab at the bottom of the screen.

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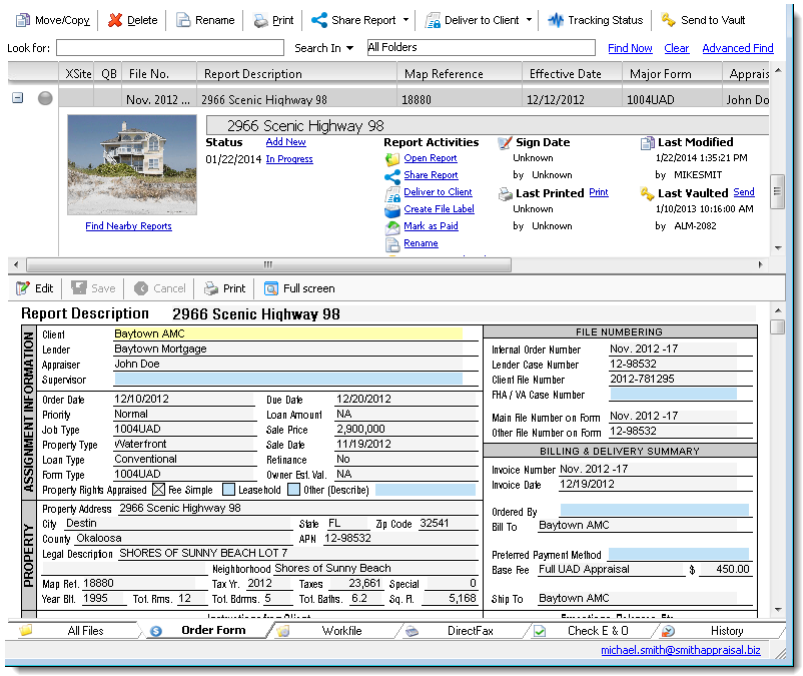


2.In the order form view, you have several options:

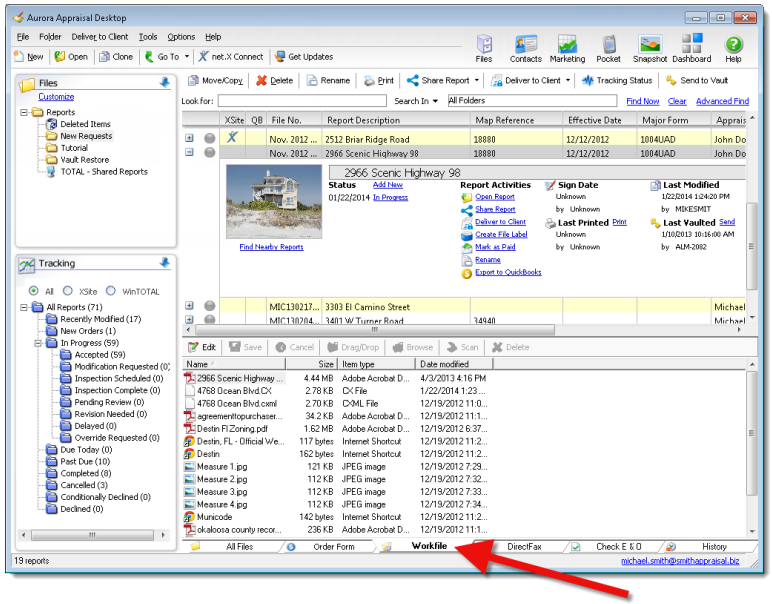
- **To edit the order** - Click **Edit** in the lower, type your changes directly in the form, and then click **Save** to update your report. If you wish to cancel your changes, click **Cancel** in the lower toolbar.
- **To print the order –** Click **Print** in the lower toolbar.
- **To switch to full screen view –** Click **Full Screen** to expand the order so that it takes up the whole screen. To revert back to the split screen view, click the **Split Screen** button that appears in place of the **Full Screen** button.

Workfile View

While WinTOTAL provides a full array of workfile management features inside each report, it's often faster to manage your workfile from the Appraisal Desktop since you do not have to open the report and since you can quickly move from one report to the next. To manage your report's workfile from the File Cabinet…

1.In the Appraisal Desktop, click to select the desired file.

2.Click the **Workfile** tab at the bottom of the screen.



3.Next, click **Edit** to open the workfile for editing. From here, you have several options:

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- **To view any item in your workfile –** Double-click it to open it in its native application.

- **To add new items into your workfile –** Simple select, drag, and drop files from any other window or click Browse and navigate out to the desired files to add them into your workfile.

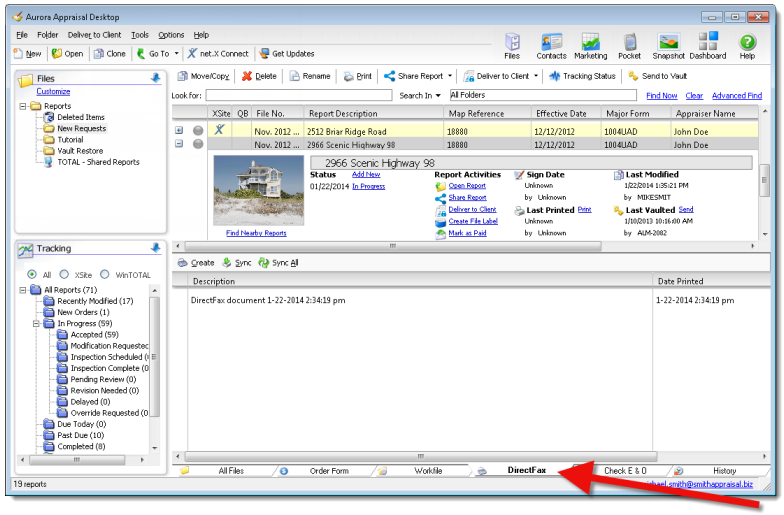
- **To scan new items into your workfile –** Click Scan and use your scanning software to generate a new scan. When your scanning software is finished scanning your documents, WinTOTAL adds them into your workfile automatically.

For information about additional workfile functions or details on using the workfile inside your report, see the Workfile PowerView section of this user's guide.

DirectFax View

Our electronic fax system, called "DirectFax," provides an easy way for you to quickly add a stack of documents into your workfile without individually scanning each item. Of course, since DirectFax is a faxed-based technology, you can give DirectFax coversheets to your clients so that they can electronically send you important documents for any given appraisal. To use the DirectFax view…

1. In the Appraisal Desktop, click to select the any file in your File Cabinet.
2. Click the **DirectFax** tab at the bottom of the screen.



3. WinTOTAL shows you a full list of items that have been sent through DirectFax into your report's workfile. From here you can:

   - **Create a new DirectFax coversheet** – Using the DirectFax coversheet, you can fax a stack of documents in to the number specified on the cover sheet to convert them into a PDF and attach them to your report's workfile. Since this coversheet is specific to this report, you can also give it to your clients so they can fax you important documents related to the selected report.

   - **Download pending DirectFax items** – If you've sent anything in to DirectFax, it takes a few moments to convert those items into PDF files. When the PDF files are ready, you can download them by clicking **Sync** or **Sync All**. **Sync** simply downloads DirectFax PDF's related to the selected report. **Sync All** retrieves any pending DirectFax PDF's and attaches those PDF's to the appropriate report workfiles.

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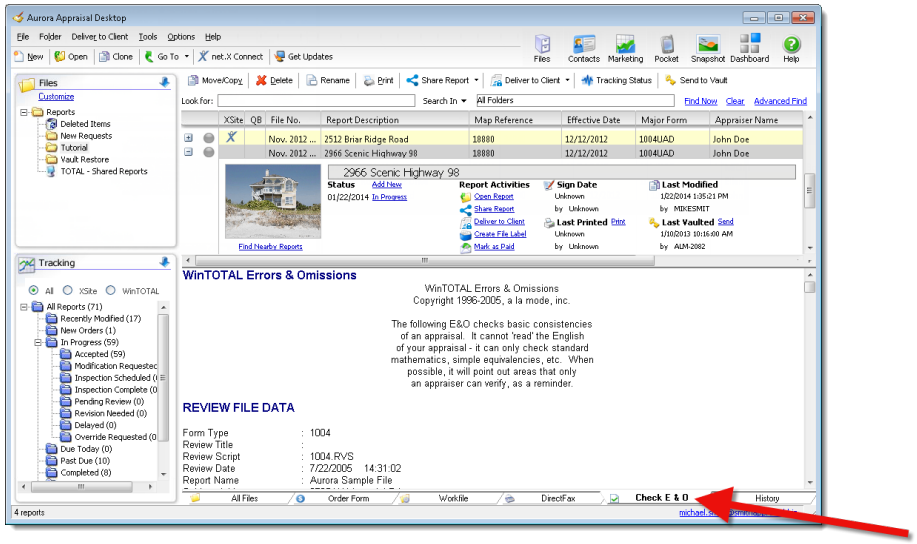
For more information about DirectFax, see the DirectFax section of this user's guide.

E&O View

If you've used the Errors and Omissions tool in WinTOTAL, you can view the results with the E&O view in the File Cabinet. While you still need to run your E&O checks inside a report, this view provides a quick look into your most recent E&O results so you can verify that they report is ready to be sent. To use WinTOTAL's E&O view….

1. In the Appraisal Desktop, click to select the desired report in the files list.
2. Click the **Check E&O** tab at the bottom of the screen.


Aurora Appraisal Desktop
WinTOTAL Errors & Omissions
WinTOTAL Errors & Omissions
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The following E&O checks basic consistencies of an appraisal. It cannot 'read' the English of your appraisal - it can only check standard mathematics, simple equivalencies, etc. When possible, it will point out areas that only an appraiser can verify, as a reminder.
REVIEW FILE DATA
Form Type : 1004
Review Title :
Review Script : 1004.RVS
Review Date : 7/22/2005 14:31:02
Report Name : Aurora Sample File
All Files
Order Form
Workfile
DirectFax
Check E & O
History

Another pane opens to display the results of the last E&O check performed on that document. Keep in mind that this is an E&O viewer, so no results appear if you have not yet run an E&O check inside WinTOTAL. For details on running E&O Checks in WinTOTAL, see the Check E&O section of this user's guide.

History View

Whether you're the only appraiser working on a report, or several colleagues have assisted you, it can be a great benefit to track when each change was made, and by whom. With WinTOTAL's report history view, you can quickly track what was added or deleted from a report or verify that you did, in fact, send the report to your client. To look over a report's history…

1. In the Appraisal Desktop, click to select the desired report in the files list using any of the search features listed above.
2. Click the **History** tab at the bottom of the screen.
3. Another pane opens showing each of the changes made to this report, when it was made and by which WinTOTAL user. Click any of the headers to resort the list of changes according to that column. For example, click the top of the **User** column to quickly see all of the users who have changed the report grouped together.

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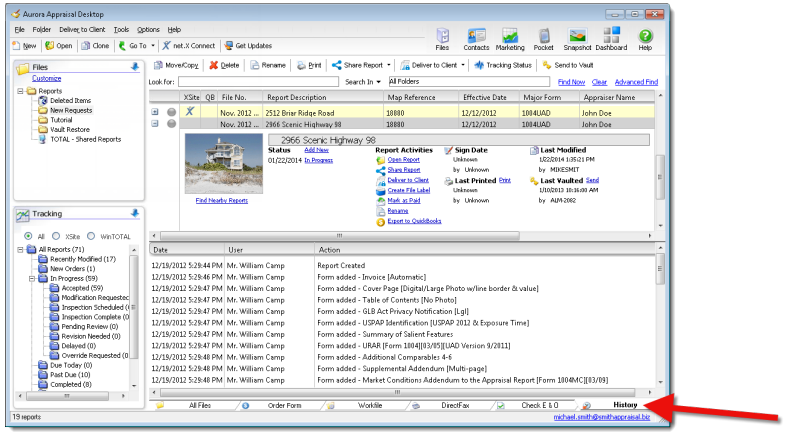

Synchronize WinTOTAL

For files you need to keep in sync with your online products like Vault or your XSite, WinTOTAL includes a synchronization tool called "net.X Connect" that harnesses the power of our net.X technology to give you the fullest control over what is sync'd and what isn't. Whenever you update a report with new order information, change the internal status of a report, mark a report to send to the Vault, or make any other changes that require WinTOTAL to update information on your online accounts, WinTOTAL adds those changes to a queue that you can preview before the changes are posted to your online accounts. These changes are broken down and separated into the 5 different queues that you can control:

1. An order download queue that downloads new and changed orders from your XSite into WinTOTAL.
2. An order upload queue that compares your orders in WinTOTAL with your orders in your XSite and then uploads the new or changed orders that it finds.
3. A status message queue that holds all of the status messages for XSite orders that could not be sent when the status was updated (for example, if you were offline when you updated the status).

> **NOTE:** Status messages and client notifications can only be synchronized and sent for orders placed through your XSite. Statuses for any other orders are for internal use only and won't be sent to your client.

4. A contact queue that holds all of the contact information that has changed in WinTOTAL since the last time you sync'd with your XSite.
5. The last queue is actually no more than direct integration with the Vault system. If you opt to use this feature, net.X Connect forces Vault to upload any pending files immediately but Vault will still run at the regularly scheduled time regardless of whether or not you choose to upload pending Vault files through net.X Connect.

Since each of these queues is self managing, all you need to do to add something to the queue is to update it. In other words, create or change an order in WinTOTAL or your XSite, update the internal status of an order, or flag some files to send to the Vault. Keep in mind that if you're using Vault's watched folders feature, new and updated files are added to the Vault's upload queue automatically and you need not do anything. Then, when you're ready to send those changes to the web, you can approve them at your convenience.

Syncing with net.X Connect

To preview and send updates that are queued to go to the web:

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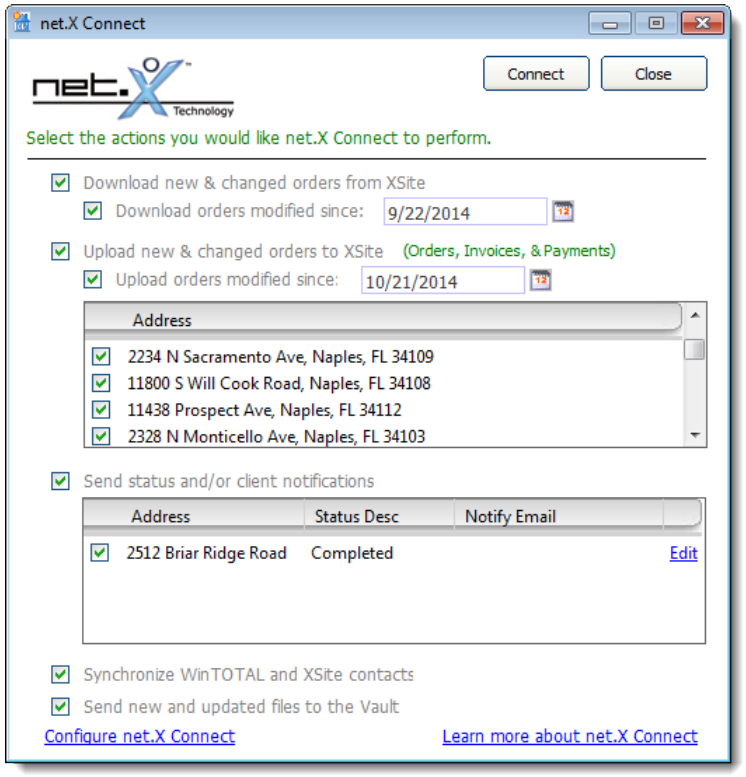
1. From the Appraisal Desktop, click **net.X Connect** in the toolbar at the top of the screen.
2. If you're running net.X Connect for the first time, be sure to configure it per the steps in the Integrate with XSites section in the Configure WinTOTAL chapter of this user's guide.
3. In the screen that appears, check the boxes to indicate what you want to sync to the web. Options are:
   - Download New & Changed Orders from XSite
     - When downloading new and changed orders, you can limit the downloaded orders to those modified since a date of your choice.
   - Upload New & Changed Orders to XSite
     - When uploading new and changed orders, you can limit the uploaded orders to those modified since a date of your choice.
   - Send Status and/or Client Notifications (XSite orders only)
   - Synchronize your contacts on the XSite and in WinTOTAL
   - Upload Vault Files
4. If you mark the **Upload New & Changed Orders to XSite** or **Send Status and/or Client Notifications** options, mark or unmark the orders listed in the respective boxes to indicate whether net.X Connect should send the information for that order.

NOTE: The only orders that appear in this list are those for which you've enabled XSite Integration. To learn more about how to enable XSite Integration on an order, see the Set Up Order Preferences section of the Order PowerView chapter in the manual.

5. For statuses, if you want to edit the message that accompanies a status notice, click the **Edit** link beside it. Then, change the status, notes, or client contact information as necessary and click **Update** when you're finished.


net.X Connect
Connect
Close
Technology
Select the actions you would like net.X Connect to perform.
Download new & changed orders from XSite
Download orders modified since: 9/22/2014
Upload new & changed orders to XSite (Orders, Invoices, & Payments)
Upload orders modified since: 10/21/2014
Address
2234 N Sacramento Ave, Naples, FL 34109
11800 S Will Cook Road, Naples, FL 34108
11438 Prospect Ave, Naples, FL 34112
2328 N Monticello Ave, Naples, FL 34103
Send status and/or client notifications
Address
Status Desc
Notify Email
2512 Briar Ridge Road
Completed
Edit
Synchronize WinTOTAL and XSite contacts
Send new and updated files to the Vault
Configure net.X Connect
Learn more about net.X Connect

6. When finished, click **Connect** to apply the synchronization.
7. Then, WinTOTAL's net.X synchronization screen appears showing you a live indicator of what it's syncing to the Internet.

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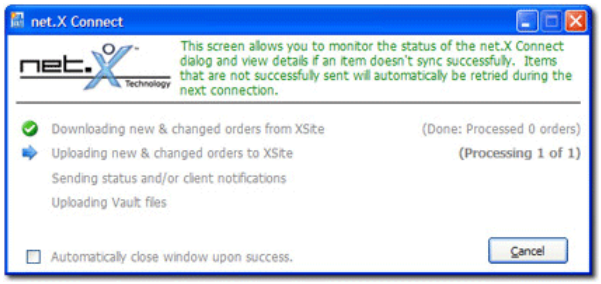
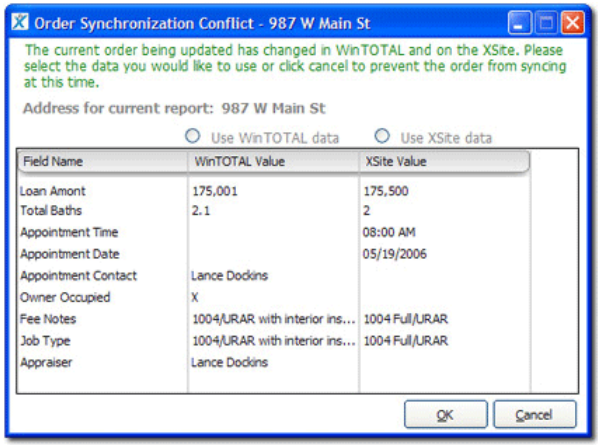

net.X Connect
This screen allows you to monitor the status of the net.X Connect dialog and view details if an item doesn't sync successfully. Items that are not successfully sent will automatically be retried during the next connection.
Downloading new & changed orders from XSite
(Done: Processed 0 orders)
Uploading new & changed orders to XSite
(Processing 1 of 1)
Sending status and/or client notifications
Uploading Vault files
Automatically close window upon success.
Cancel

- If you indicated you wanted to send files to the Vault, be sure to click **Finish** once the upload is complete.
- As WinTOTAL synchronizes your data with your XSite, it compares the information in your XSite with the information in WinTOTAL. If it finds differences in the data in those locations, it prompts you about which data you'd like to use. Just mark the option above the data you want to use and click **OK** to continue.



HINT: To save time you can configure WinTOTAL to always use the data from WinTOTAL or your XSite instead of prompting you each time there are conflicts between the data in each location. For more information about how to change this default, see the Integrate with XSites section of the Configure WinTOTAL chapter in this user's guide.

8. When the synchronization is complete, click **Close** to close the net.X synchronization screen or check the **Automatically close** box first if you'd prefer that WinTOTAL closes this screen for you in the future.

Sync History

As you use net.X Connect to synchronize WinTOTAL with your XSite or your Vault account, you may want to see a detailed history of what you've sync'd. To view all items that have been successfully synchronized…

1. From the Appraisal Desktop, click **Tools**, **net.X Connect History**.
2. When you're finished viewing your history, click **OK** to close it.

Contacts

Naturally, WinTOTAL contains a complete contact database you can use to store and retrieve information about all of your business contacts. In contrast to former versions of WinTOTAL, the Aurora generation of WinTOTAL recognizes the difference between a company contact and an individual contact. As such, you can pair contacts with companies easily allowing you to redistribute individuals who move to other companies later. To access WinTOTAL's built-in contact manager, click **Contacts** in the top toolbar of the Appraisal Desktop.

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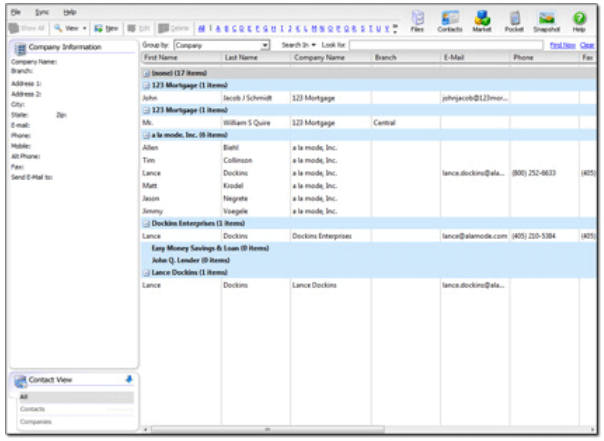

Find Contacts

With WinTOTAL's built-in contact manager, you can manage a full list of contacts and keep that list in sync with your XSite. As the list continues to grow, you may need to rearrange your contacts view to filter out unnecessary contacts, sort your contacts based-off a specific piece of contact information, or perform a basic search for contacts.

Filtering & Grouping Contacts

To filter and group contacts…

1. From WinTOTAL's contact manager, click the item in the View pane on the left to show the types of contacts you wish to find. Options are:
   - **All** – Shows all contacts, grouped by company
   - **Contacts –** Shows the individuals in your contacts database
   - **Company –** Shows only company contacts in your database
2. If you want to filter the list further, select another filter from the **View** menu at the top of the screen. Options are:
3. **View** menu and select the appropriate filter. Options are:
   - **Contacts for all users** – If you work in an office with multiple appraisers, you can display the contacts from your colleagues' databases as well as your own. Click the arrow beside the **View** button in the toolbar and select **Contacts for All Users**.
   - **Contacts for this user only** – To limit your display to only those contacts you entered, click the arrow beside the **View** button in the toolbar and select **Contact for this user only**.
   - **Appraiser, Client, Lender, Agent, Owner, Other** – Limits the displayed list of contacts to just those that qualify as the types you specify. Click to check each type of individual you wish to see.
4. If you're looking for a very specific contact, you can limit the list of contacts to just those that begin with a certain letter. Just click the appropriate beginning letter across the top of the screen to limit your contacts to those that begin with that letter. To revert to a full list of contacts, click **All**.
5. If you want to organize your contacts in ascending or descending order by a specific column in your contacts database, click the column header for the column by which you want to sort. Click that column header again to reverse the sort.
6. Then, to group your contacts by a piece of related information, select an appropriate category by which to

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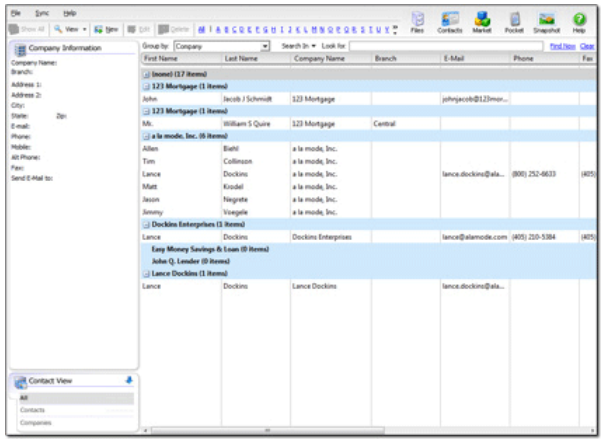
group from the Group By drop-down menu at the top of the screen. Options are:

- Full Name
- Last Name
- E-Mail
- Phone
- Fax
- Mobile
- Address
- City
- State
- Zip
- None

When you've grouped contacts, each group is headed by a non-white colored row listing the contact by which you're grouping. Then, the contacts within that group are listed below it in white. You can expand and collapse the list of contacts within each group by clicking the plus or minus sign beside each group header.



Searching for Contacts

To search for a specific contact…

1. From WinTOTAL's contact manager, type a search phrase into the **Look for** field above the contact list.
2. Select the field you'd like to look in from the **Search In** drop-down list.
3. Click **Find Now** to display the results.
4. Click **Clear** to reset your search criteria and display all of your files.

Expanding & Collapsing Contacts

To expand or collapse the contacts in your address book so you can see the contacts within any contact group, click the **Expand** or **Collapse** buttons in the main toolbar.

Create Individual Contacts

To add a new individual contact to your database…

1. From WinTOTAL's contact manager, click **Add** in the toolbar.
2. When the **Contact Details** screen appears, select the option at the top to indicate that you're adding an **Individual**.

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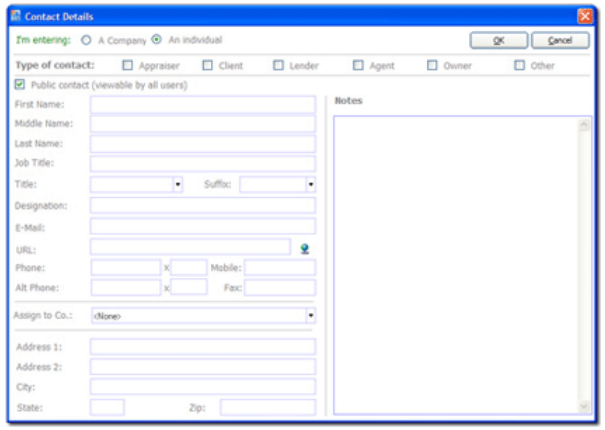

3. Next, select at least one option from the **Type of contact** check boxes. You can choose as many as you like.
4. If you'd like to limit access to this contact to yourself, un-check the **Public Contact** box. If this is checked, all of the users on your system can view this contact.
5. Complete the remaining text boxes for this individual and be sure to select the appropriate company from the **Assign to Co.** menu.

> **Note**: Keep in mind that the drop-down company list only contains company contacts that you've created thus far. If you need to add a company to the list, add it first and then assign this contact to the company later.

6. Depending on the contact **Type** you indicated you have different options available:

For Appraiser Contacts

- Choose an **XSite User** profile that corresponds with this appraiser if you've integrated WinTOTAL with your XSite.
- Fill out the appraiser's license and certification in the fields provided.

For Client and Lender Contacts

- Create a **Username** and **Password** for your clients to use when they log into your XSite to place orders and check order statuses.
- Resend a password to clients who have lost their usernames and passwords for your XSite.

> **Note**: These options require that you have integrated WinTOTAL with your XSite. For more information on this process, see the Create Client Accounts section of this user guide.

- Finally, type any notes about this contact in the available **Notes** box.
- When the contact information is complete, click **OK** to save this contact to your database.

Create Company Contacts

To add a new company contact to your database…

1. From WinTOTAL's contact manager, click **Add** in the toolbar.
2. When the **Contact Details** screen appears, select the option at the top to indicate that you're adding a **Company**.

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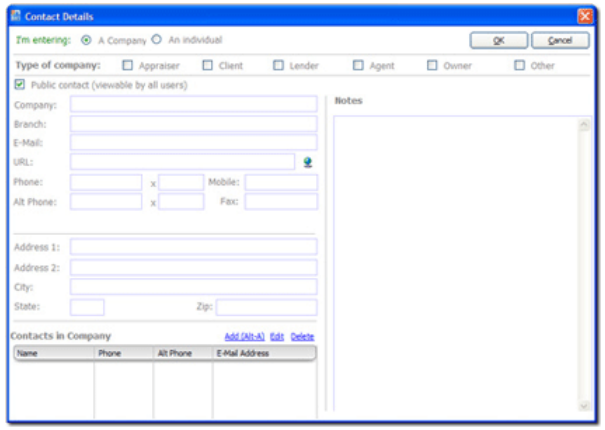

3. Next, select at least one option from the **Type of contact** check boxes. You can choose as many as you like.
4. If you'd like to limit access to this contact to yourself, un-check the **Public Contact** box. If this is checked, all of the users on your system can view this contact.
5. Complete the remaining text boxes for this individual or company.
6. You can add individuals who work for that firm using the **Contacts in Company** box at the bottom of the screen. Click **Add** in the **Contacts in Company** box.
7. Complete the individual's information and click **OK**. Use the **Edit** and **Delete** links to modify existing contacts for that company. Continue adding as many individual contacts as necessary for this company.
8. Type any relevant notes about your contact in the available **Notes** box.
9. When the contact information is complete, click **OK** to save this contact to your database.

Manage Existing Contacts

Once you've created a list of contacts, you can easily return to edit or delete them later. To do so…

1. From WinTOTAL's contact manager, click to select the contact you wish to manage.
2. Then, modify it as necessary:
   - To edit a contact, double-click it.
   - To delete a contact, click **Delete** in the top toolbar.
   - To assign a contact to a different company, double-click it and select a new company from the **Assign to Co** drop-down.

Merge Duplicate Contacts

If you regularly type contacts into your reports instead of selecting them from WinTOTAL's provided drop-downs or if you regularly receive orders through your Appraiser XSite, you may accrue a number of duplicate contacts in your address book just in the natural course of doing business. To help you keep your address book organized, WinTOTAL provides a simple Contacts Cleanup Wizard and some basic contact merging functions you can use to combine related contacts. To use the Contacts Cleanup Wizard...

1. From WinTOTAL's contact manager, click **Sync**, **Contacts Cleanup.**

Note: If you've never run the Contacts Cleanup before, this feature will appear in the main toolbar as a **Contacts Cleanup** button.

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2. In the screen that appears, review the notes about the contact cleanup process and click **Begin**.
3. Once your contacts have been downloaded, you're taken to the Company Cleanup step. Click **View**, **Duplicates** to see your duplicate company contacts.
4. Click the + symbols beside each contact to view potential duplicates, select the specific duplicate contacts you wish to merge. Contacts denoted with a yellow flag are ad-hoc contacts. Contacts denoted with a red flag are contacts that have previously been deleted, but that are still tied to orders in WinTOTAL.

Hint: To select multiple contacts at once, hold down the **Ctrl** key on your keyboard and click each contact you wish to select.

5. Click **Merge Selected** to merge the selected contacts.
6. In the screen that appears, verify that the contact information for the merged contact is correct. Then, click **Save** to apply your changes and click **Yes** to merge the selected companies.
7. Repeat this process for any other duplicate company contacts and then click **Next**.
8. In the Individual Contact Cleanup step, repeat steps 3-6 above to merge your duplicate individual contacts.
9. Finally, in the last step, click **Finish** and then **Yes** to apply your changes to your current reports and upload the changes to your XSite. When the process is finished, click **OK**.

Merge Duplicate Contacts

Once you've run through the Contact Cleanup Wizard for the first time, you may never need to run it again. It's always available in case you need to merge a bunch of duplicates, but often you can avoid that by just merging contacts as you notice them. To do so...

1. From WinTOTAL's contact manager, click to select the contacts you wish to merge.
2. Click **Merge Selected** in the main toolbar.
3. In the screen that appears, verify that the contact information for the merged contact is correct and make any necessary changes.
4. When finished, click **Save** and then **Yes** to save your merged contact.

Create Client Login Accounts

Whenever you create new contacts in WinTOTAL, you can easily create client login accounts on your XSite at the same time. In addition to consolidating and simplifying the ordering process for both you and your clients, client login accounts provide a variety of other benefits, such as:

- You can automatically send your clients an updated status message when you change the status of their orders.
- Your clients can view the order details for existing orders or place new orders from your XSite.
- You can deliver the finished report back to your XSite so that your clients can pick it up at their convenience.

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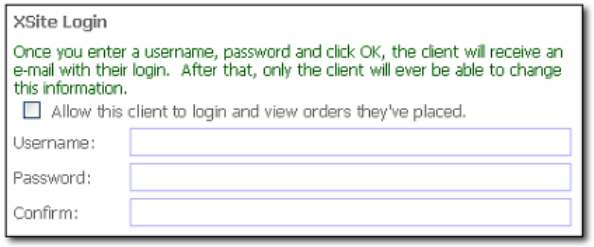
- Your clients don't have to sign up on your XSite in order to use your XSite's ordering features.

To create client logins for your clients…

1. From WinTOTAL's contact manager, choose a contact or company from your list and click **Edit** to open the contact.
2. When the **Contact Details** screen appears, check the box(es) to indicate that the contact is either a **Lender** or **Client** in the **Type of Contact** section at the top of the screen.
3. If you're editing an individual contact, check the **Allow this client to login** box in the **XSite Login** section on the right and then type the **Username** and **Password** you want your client to use, in the available boxes on the right.

   - OR –

   If you're editing a company contact, scroll to the **Contacts in Company** section at the bottom of the **Contact Details** screen and **Add** or **Edit** a contact in your client company. Then, just fill out any necessary contact information, check the **Allow this client to login** box in the **XSite Login** section on the right, and enter a **Username** and **Password** for your client.


XSite Login
Once you enter a username, password and click OK, the client will receive an e-mail with their login. After that, only the client will ever be able to change this information.
Allow this client to login and view orders they've placed.
Username:
Password:
Confirm:

4. Finally, click **OK** to save your changes. The client login is then created for your client and notifications are sent to inform your client of their login credentials.

Ad-hoc Contacts

As with all great billing tools, in WinTOTAL, it's vital to provide an accurate list of your contacts and customers to accurately track your billing activities. To assist you in maintaining an accurate contact list, WinTOTAL introduces a new type of contact: the ad-hoc contact. Ad-hoc contacts are those contacts with whom you work on a one-time basis. Over time, as you create contacts, these one-time contacts can accumulate, cluttering your contacts list. Ad-hoc contacts can help you eliminate the contact clutter by providing a way to designate those one-time customers as exactly that – one time customers. When you mark a contact as an ad-hoc contact, WinTOTAL hides these contacts from your contact drop-down menus and from regular view in the contact manager since it's unlikely that you will need to access their information again. Over time if those contacts become regular customers, you can promote them to full-time customers through WinTOTAL's contact manager.

Viewing Ad-Hoc Contacts

To view and manage your list of ad-hoc contacts…

1. In WinTOTAL's contact manager, click the **View Ad-hoc** button to show your ad-hoc contacts in the list. The ad-hoc contacts in your database appear, each denoted by a yellow flag.

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2. Work with your ad-hoc contacts as you would with any other type of contacts. Then, to hide them again, click **Hide Ad-hoc** in the toolbar.

Toggling Ad-Hoc Status

To toggle a contact from ad-hoc to full-time or vice-versa…

1. In WinTOTAL's contact manager, click the **View Ad-hoc** button to show your ad-hoc contacts in the list.
2. Click the ad-hoc contact you wish to promote and then click **Edit** in the toolbar.
3. In the screen that appears, check or uncheck the **Exclude from data entry drop-down list** check box. An ad-hoc contact is one that is excluded from your data entry drop-down menus in WinTOTAL. A full-time contact is one that WinTOTAL includes in those drop-down menus for quick reference as you're selecting contacts in your report.
4. Click **OK** to save your changes.

Synchronize Contacts

Another option for setting up your contacts database is to synchronize it with your XSites Contacts Database. Unlike importing, when you synchronize your contacts, names that appear in one database are copied to the other automatically. So if you've added a name in your WinTOTAL Contacts Database, it is copied to your XSite Contacts list. Or if you've added a contact in Outlook, you can upload it to your XSite and it is then added to the WinTOTAL Contacts Database. To synchronize contacts with your XSite…

1. First, make sure that you've associated WinTOTAL with your XSite.
2. From WinTOTAL's contact manager, click the **Sync** menu and choose **XSite** OR simply run net.X Connect to sync your contacts and all other XSite-related data.

WinTOTAL quickly synchronizes your WinTOTAL contacts with those in your XSite so you can maintain the same list in both places.

Import Athena Contacts

If you used Athena prior to the current version of WinTOTAL, you may have a long list of contacts you want to import from your old installation. If you want to import your old contacts from Athena, you can easily do so with WinTOTAL's contact import tool.

1. From WinTOTAL's contact manager, choose **File**, **Import from Athena**.
2. The **Import Athena Contacts** screen displays a list of contacts from your Athena database. Use the scroll bars to scan through this list. Check the **Import** box beside a contact to flag it for import into your Aurora Contacts Database. If this contact is a company you'd like to import, check the box in the **Company** field. If you'd like to import your entire database, just click **Mark All** at the bottom of the list.

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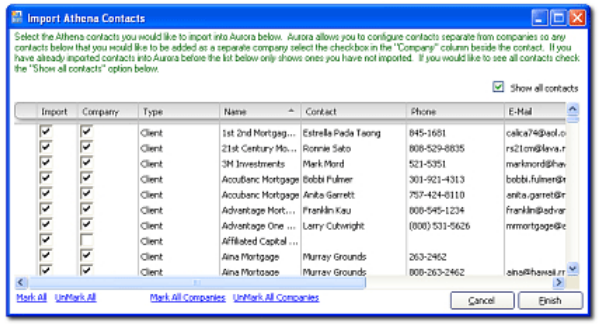

Import Athena Contacts
Select the Athena contacts you would like to import into Aurora below. Aurora allows you to configure contacts separate from companies so any contacts below that you would like to be added as a separate company select the checkbox in the "Company" column beside the contact. If you have already imported contacts into Aurora before the list below only shows ones you have not imported. If you would like to see all contacts check the "Show all contacts" option below.
Show all contacts
Import
Company
Type
Name
Contact
Phone
E-Mail
Mark All
UnMark All
Mark All Companies
UnMark All Companies
Cancel
Finish

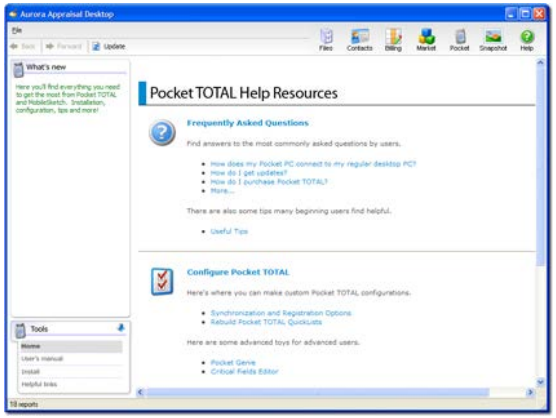
3. Once you've selected all of the desired contacts, click **Finish**. Your contacts are imported into your current database.

If you do not import all of your Athena contacts at once, you can go back and repeat these steps. Each time you run the Import function, only those contacts which you have not already imported are displayed. If you want to see other contacts, click the **Show all contacts** check box in the **Import Athena Contacts** screen.

Pocket TOTAL

Note: These instructions are for Pocket TOTAL, the legacy version of our field data-gathering software. While we no longer sell Pocket TOTAL, you are able to continue using it if you still have a valid license. If you were looking for our current mobile data-gathering software, TOTAL for Mobile, click here.

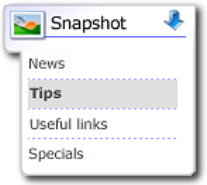
The **Pocket** section of the Appraisal Desktop lets you configure the Pocket TOTAL data-gathering system for use with WinTOTAL. To access the Pocket PowerView, click **Pocket** at the top of the Appraisal Desktop.



For more information on Pocket TOTAL, its installation and use, consult the Pocket TOTAL user's guide.

SnapShot

The SnapShot PowerView in WinTOTAL contains a wide variety of helpful tools and content. While the SnapShot view may seem familiar to you if you've used previous versions of WinTOTAL, it has been upgraded to encompass more useful information to help you become familiar with WinTOTAL. To access WinTOTAL's SnapShot PowerView, click **SnapShot** in the Appraisal Desktop. From there, you can expect to see a variety of useful information, including:



News – Here you can find the latest appraisal news and the most recent appraisal newsletter.

Tips – The Tips and Tricks to simplify the appraisal process inside WinTOTAL that you usually find at www.alamode.com/wintotal/tips can be found in this **Tips** view.

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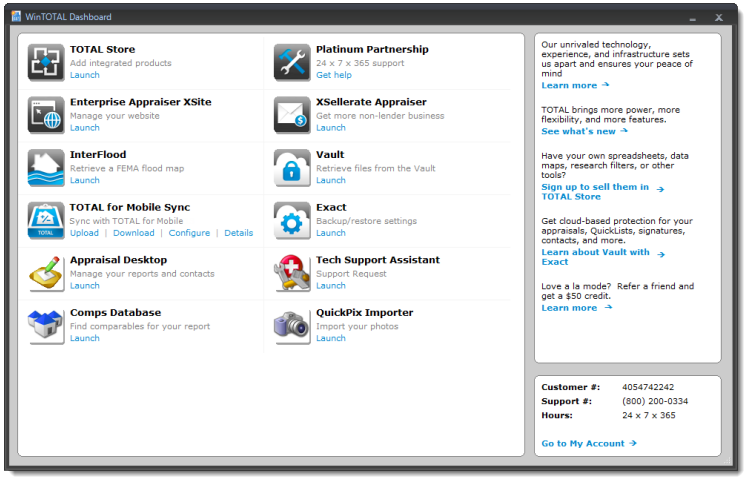
- **Useful links** – Contains just that. Here you can find useful links to a variety of resources from government websites to online appraiser forums.

- **Specials** – This view lists all the latest a la mode product specials so you can find the products you need for the best price.

WinTOTAL Dashboard

The WinTOTAL Dashboard gives you access to instant upgrades, data integration, and support contract information. It also gives you a central point to view or launch any of the tools within WinTOTAL, as well as tools purchased from the WinTOTAL Store.

To start the WinTOTAL Dashboard, click the **Dashboard** icon ( ) on the upper right of the Appraisal Desktop or from within a report.



TOTAL for Mobile Sync

Get Help

WinTOTAL includes a wide variety of resources you can use to familiarize yourself with the forms, features, and functions it provides. Whether you learn by reading, seeing, hearing, or doing, WinTOTAL has a solutions that can assist you in maximizing the efficiency of your business. To access a full list of help tools, including a fully searchable knowledgebase, click **Help** in the Appraisal Desktop.

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Here's a brief description of the tools you can expect to find in WinTOTAL's Help PowerView

Searchable Knowledgebase

Simply type in a search phrase and click **Search** to use our searchable knowledgebase.

Webinars & Training Videos

Sometimes, the easiest way to learn a product is to see it in action. Visit our training page through this link to review a full list of live training sessions and pre-recorded educational videos.

On-Screen User's Manual

The complete searchable reference guide for WinTOTAL, stored on your local computer for easy reference.

Online User's Manual

An easier to read reference guide for WinTOTAL, located in our Knowledgebase.

WinTOTAL Tutorial

A walkthrough of WinTOTAL that help should help you complete the most common tasks in WinTOTAL.

WinTOTAL Networking Guide

If you intend to install WinTOTAL in a networked environment, this guide walks you through the process of installing it correctly.

Reseller & Education Network

Our searchable network of authorized resellers and education partners is what you need if you want special training or support.

Need more help?

If you're having problems with WinTOTAL, but don't have time to call our support desk, you can get help by clicking **Support Request** in the toolbar. This launches the Tech Support Assistant, from which you can detail the problem you're having and send it to our support department. As an added advantage, the assistant scans your system and sends along a detailed diagnostic report that often helps our technicians to pinpoint your problem.

Market to Past Clients

WinTOTAL now has direct integration with XSellerate to help you market your appraisal business to past clients. Now, if you want to send a mailer to your past clients to remind them about your previous work for them and suggest that it might be time to have their home reappraised you can do so by putting WinTOTAL together with XSellerate in your Enterprise level Appraiser XSite. If you want to print mailing labels and customized print messages advising your past clients to have their home reappraised…

1. From the Appraisal Desktop, click **Tools**, **Export Address Data to XSellerate**.
2. When a screen appears prompting you for a date range, choose **From** and **To** dates to limit the mailer to those

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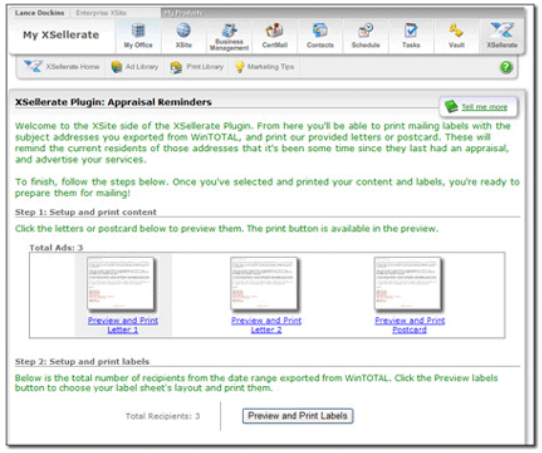
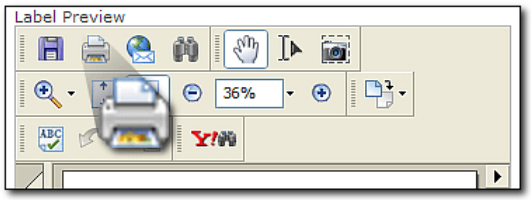
clients whose last appraisal falls within the dates you specify.

3. Click **OK** to continue.
4. When your XSite's login page appears, type in your XSite **Username** and **Password**. Then, click **Login**.
5. In the screen that appears, you're presented with 3 ad options. Preview each option by clicking the respective links. When you find an ad that you're satisfied with, click the disk icon to save a copy of the ad to your computer.


My XSellerate
XSellerate Plugin: Appraisal Reminders
Welcome to the XSite side of the XSellerate Plugin. From here you'll be able to print mailing labels with the subject addresses you exported from WinTOTAL, and print our provided letters or postcard. These will remind the current residents of those addresses that it's been some time since they last had an appraisal, and advertise your services.
To finish, follow the steps below. Once you've selected and printed your content and labels, you're ready to prepare them for mailing!
Step 1: Setup and print content
Click the letters or postcard below to preview them. The print button is available in the preview.
Total Ads: 3
Preview and Print Letter 1
Preview and Print Letter 2
Preview and Print Postcard
Step 2: Setup and print labels
Below is the total number of recipients from the date range exported from WinTOTAL. Click the Preview labels button to choose your label sheet's layout and print them.
Total Recipients: 3
Preview and Print Labels

6. The provided ads are intentionally generic so that you can simply print an ad and send it out as a part of your mailer without a need to edit it, but it is possible to edit these ads to customize them before mailing them out. In order to edit this ad prior to sending out your mailing, you can simply copy and paste the ad's contents into a word processor, edit it to your needs, and save it for your printer from there.
7. To print mailing labels for your XSellerate mailer, click the **Preview and Print Labels** button.
8. In the **Print Labels** window that appears, choose your Avery® label type and preferred printing options from the available choices. Options are:
   - Require that the contact contains a full mailing address to print a label for it so that you don't print labels you can't use for mailings.
   - Print a custom label instead of labels from contacts by typing in the preferred label.
   - Force the label printer to print a full sheet of your custom labels.
   - Choose the starting label on your label sheet by clicking the corresponding cell in the preview page on the left.
9. When you're ready to print your labels, just click the **Print** icon in the **Label Preview** pane to send them to the printer.



Now, just combine the ads you've created with the mailing labels you've printed and send your mailer to start bringing in more appraisal business.

Order PowerView

Since time efficiency is key to running a successful appraisal business, the **Requester** has been replaced with a more powerful **Order** PowerView to help you manage and begin

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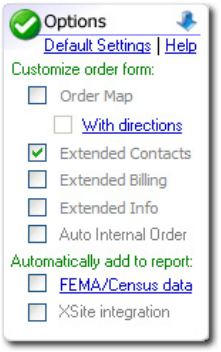
your appraisal orders. Since the **Order** PowerView uses a form instead of an application like the Requester, you can now enter even more information on the fly. While you could use the **Requester** to help you fill out all the fields in your forms, the new **Order** PowerView allows you to geocode your property, add a map, and get driving directions before you even begin your form work. There are two ways to access the Order PowerView:

1. Open an existing report and click **Order**.
2. Click **New** in the upper left corner of WinTOTAL or the Appraisal Desktop to create a new report. WinTOTAL takes you to the Order PowerView automatically to assist you in starting your reports.

Set Up Order Preferences

As you fill out the order form in the **Order** PowerView, you have the option of allowing WinTOTAL to complete several tasks for you on the fly. These items are controlled from the **Options** menu located on the left side of the **Order** PowerView. To automate some of the initial order setup processes in your report, check each of the options you wish to apply using the **Options** pane to the left of the Order PowerView. Options include:

- **Default Settings** - Allows you to determine how WinTOTAL names your new report files and whether you automatically or manually push your WinTOTAL orders to your XSite.
- **Order Map –** Automatically adds a map to your order form when you fill in the full subject address for your order.
- **With Directions –** If you opted to include a map in your order form, checking this option adds directions from your office to the subject property to your order form as well.



- **Extended Contacts –** Adds new sections to your order form permitting you to add detailed information about all of your contacts to it.
- **Extended Billing –** Adds a **Billing** section to your order form to help you track billing and payment for your report. This section replaces the **Billing** PowerView in Athena.
- **Extended Info –** Adds another section to your order form allowing you to add notes and a wealth of other information about the subject property.
- **Auto Internal Order –** WinTOTAL automatically generates an order number for each new report when this option is selected. To specify the format of the numbering, click on the link and set your preferences in the screen that appears. See the Automate Order Numbering section of this user guide for more details.
- **FEMA/Census Data –** Automatically adds IDC data to the appropriate fields in your report as you fill out your order form.
- **XSite Integration –** If you have an Appraiser XSite and want to keep your XSite order list in sync with WinTOTAL, just mark this option. If it's your first time using XSite Integration, click the **XSite Integration** link next and enter your XSite **Username** and **Password**.

Note: Whenever a new order from your XSite is downloaded into WinTOTAL or a new order is pushed from WinTOTAL to your XSite, an XSite symbol

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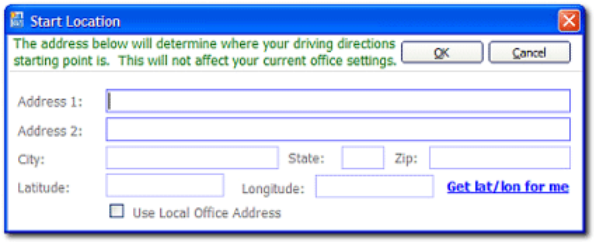
appears in the **XSite** column to indicate that the synchronization is complete.

Change Start Points for Directions

If you use WinTOTAL to retrieve directions to your property inspections, you may need to change the starting location for those directions from time to time. In WinTOTAL's **Order** PowerView, you can specify an alternate starting point for your driving directions. To do so:

1. In WinTOTAL's Order PowerView, check the **Order Map** and **With Directions** boxes in the **Options** pane on the left side of the screen.
2. Click the **With Directions** link in the **Options** pane.



3. In the screen that appears, indicate whether you want to start from your local office address or from an alternate starting point by checking or unchecking the **Use Local Office Address** box at the bottom.
4. If you're using a start point other than your local office, type in the address you wish to use as the starting point for your driving directions into the available boxes.
5. Finally, click **OK** to apply your changes.

After a few moments, WinTOTAL automatically changes the driving directions in your order form to start from the new location.

Automate Order Numbering

If you've defined your own custom order numbering scheme to help you keep track of each new order that comes into your office, you may be able to use WinTOTAL's auto-numbering tools to automate the order numbering process so that you don't have to manage it. To enable automatic internal order numbering…

1. In WinTOTAL's Order PowerView, check the **Auto Internal Order** box in the **Options** pane to the left of the **Order** PowerView of the Appraisal Desktop.
2. Next, click the **Auto Internal Order** link.
3. When the **Configure Internal Order Number** window appears, determine whether you want to make your order numbering system available to all users on your network or just on your machine and then mark either **Just for me** or **Office-wide (All WinTOTAL users)** option to indicate your choice. If you're not using a network installation of WinTOTAL, mark the **Just for me** option.

Note: If you're using a network setup of WinTOTAL and you select to use this as an **Office-wide** setting, it applies to all users in your network and can be changed by all users in your network. If the other users in your network wish to use a different internal ordering scheme, they must repeat this process and use the **Just for me** option.

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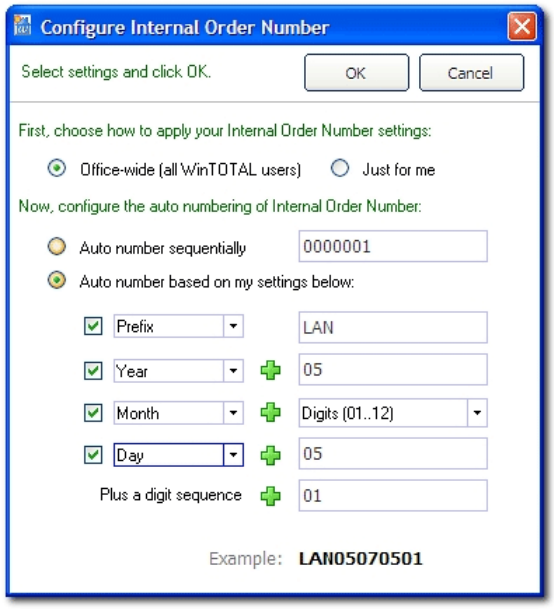
4.



5. Next, configure the auto-numbering scheme you'd like to use for your internal order numbers by choosing from the following options
   - **Auto number sequentially** – Increments the internal order number each time you generate a new report. When you choose this option, you need to designate the starting number for your internal ordering scheme.
   - **Auto number based on my settings below** – Provides a customizable format for your automatic internal order number. Using this option you can include a prefix, year, month, or day in your internal order and control the order of their appearance.

Hint: If you're using the **Auto number based on my settings below** option, you can preview the internal order number format by viewing the **Example** field at the bottom of the window.

6. Depending on which option you chose, you must either configure the starting number for your internal order number or the prefix, day, month, year, and order of appearance in your internal order numbering scheme.
7. When you're finished, click **OK** to implement your internal order numbering scheme on all your future appraisals.

Complete the Order Form

In order to take advantage of all WinTOTAL's time saving features, you should take the time to fill out as much information as possible. Where applicable, WinTOTAL uses this order information to fill out related fields throughout your report.

1. Through the Order PowerView, fill out a **Report Description**, **Property Address**, **City**, **State**, and **Zip** at a minimum.
2. For best results, be sure to select contacts from your contacts database using the drop-down menus provided beside each contact field.
3. Finally, fill out any additional information in your order form as are necessary. As you're filling out the order form, keep these things in mind to assist you in filling it out quickly.
   - QuickLists are available in the pane to the left of the screen to help you fill out your order form quickly.

Hint: One of the fastest ways to fill out the order form is to create QuickList entries for the different products you offer or the different areas you regularly appraise. With a strong set of product or area based QuickLists, you could easily fill out the entire order form and invoice with only a few clicks.

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- Notice that the field color changes to gray to indicate you've been to this portion of the form as you move through the fields in the order form. Fields you have not updated remain blue.
- In any field that contains the or icon, you can select data from or add entries to your Contacts Database.
- In any field that contains the icon, you can select a date from a pop-up calendar that appears when you click the icon.
- In the field that contains the icon, you can automatically insert a location map, flood, and census data into your report when you click the icon.
- In the appointment field that contains the icon, you can add your appointments to your Outlook or XSites calendar to help you maintain your schedule.
- When the » icon appears in a field, click it to designate that the content of that field is the same as either the Internal Order, Lender Case, Client File or FHA/VA case numbers entered in the **Tracking** section of the order form.
- Additional fields have a drop-down menu from which you can choose additional "Same as.." data. The items displayed in these menus change depending upon the type of information each field might contain. For example, the **Client** field can be the "Same as" the **Lender**, the **Bill to** or the **Ship to** fields.
- When the icon appears in a field, this indicates the presence of a "recent response" entry. Use your mouse and click the icon to display the list of your most recent entries in that field. Or, press **Alt + Down Arrow** on your keyboard.

Get Flood & Census Data

If you want to have a bit more control over what data WinTOTAL automatically inserts into your report when it gathers flood, census, and other data from the Internet, you can define your preferred format for that data in WinTOTAL's Order PowerView. To do so…

1. In WinTOTAL's Order PowerView, check the **FEMA/Census Data** box and then click the **FEMA/Census Data** link in the **Options** pane on the left.

2. Mark your preferred data using the provided settings. Options include:

   - Make all addresses and other inserted data in uppercase
   - Append the FIPS # to the beginning of the Census Tract
   - Control which information (Census Tract, FEMA Zone, Subject Address/Zip, etc) is automatically retrieved for you by having WinTOTAL prompt you each time, download all data, insert only data that it finds when it connects to our servers, or choose the data you want WinTOTAL to add to your report automatically by checking the each option.

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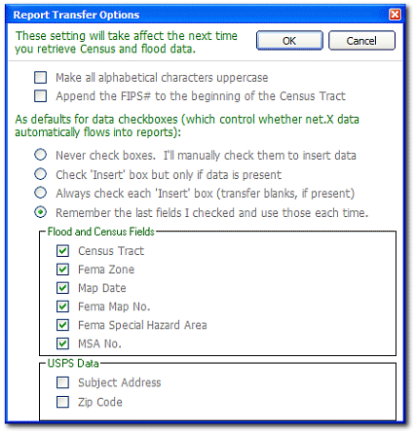
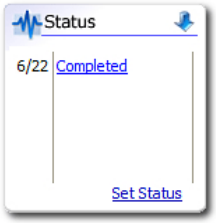
3.When finished, click **OK** to apply your changes.


Report Transfer Options
These setting will take affect the next time you retrieve Census and flood data.
OK
Cancel
Make all alphabetical characters uppercase
Append the FIPS# to the beginning of the Census Tract
As defaults for data checkboxes (which control whether net.X data automatically flows into reports):
Never check boxes. I'll manually check them to insert data
Check 'Insert' box but only if data is present
Always check each 'Insert' box (transfer blanks, if present)
Remember the last fields I checked and use those each time.
Flood and Census Fields
Census Tract
Fema Zone
Map Date
Fema Map No.
Fema Special Hazard Area
MSA No.
USPS Data
Subject Address
Zip Code

Set Internal Status

In addition to the internal status tools provided in WinTOTAL's Appraisal Desktop, you can also view and update your internal status history through WinTOTAL's **Order** PowerView.



Viewing Status Details

To view the full details for any internal status update in your order's status history:

1.In the Order PowerView, click the status name's link in the **Status** pane on the left. WinTOTAL replaces the order history with a detailed explanation behind the change in order status. You can view the time and date that the status change occurred in addition to any notes you may have included at the time you changed the order status.

2.Use the **Previous** and **Next** buttons to see the detailed information for each previous status change.

3.Click **Back** at the top of the **Status** pane to return to the order history overview.

HINT: To quickly review an entire status history or update the status of numerous reports in a hurry, you can use the detailed file view provided in WinTOTAL's Appraisal Desktop.

Updating Order Status

To update the status of your current report:

1.In the Order PowerView, click **Set Status** in the **Status** pane to the left.

2.When the **Add Internal Status** window appears, choose the desired internal status from the drop-down list in the upper, right corner. Depending on the status you select, more options may appear. For instance, if you choose Inspection Scheduled, additional fields appear where you can enter the date and time of the scheduled inspection.

3.Type any comments you want to include with the status change in the **Notes** box.

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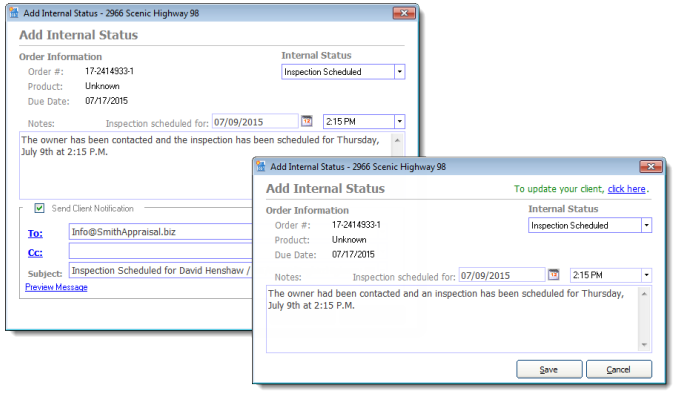
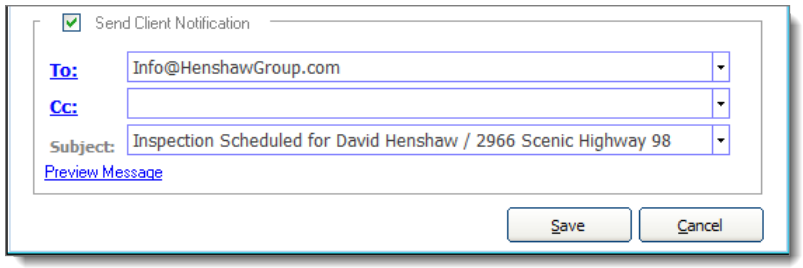

Add Internal Status - 2966 Scenic Highway 98
Add Internal Status
Order Information
Order #: 17-2414933-1
Product: Unknown
Due Date: 07/17/2015
Internal Status
Inspection Scheduled
Notes: Inspection scheduled for: 07/09/2015 2:15 PM
The owner has been contacted and the inspection has been scheduled for Thursday, July 9th at 2:15 P.M.
Send Client Notification
To: Info@SmithAppraisal.biz
Cc:
Subject: Inspection Scheduled for David Henshaw /
Preview Message
Add Internal Status - 2966 Scenic Highway 98
Add Internal Status
To update your client, click here.
Order Information
Order #: 17-2414933-1
Product: Unknown
Due Date: 07/17/2015
Internal Status
Inspection Scheduled
Notes: Inspection scheduled for: 07/09/2015 2:15 PM
The owner had been contacted and an inspection has been scheduled for Thursday, July 9th at 2:15 P.M.
Save
Cancel

Note: If you're using WinTOTAL's status tools in conjunction with your XSite so that you can benefit from proactive status messages, the **Notes** field becomes the body of the status notice e-mail.

4. If this is an XSite order and you've integrated with your XSite, check the **Send Client Notification** box to send a notification of this status change to your client. Then, use the drop-down menus to select a recipient and subject for your message or just type that information yourself.

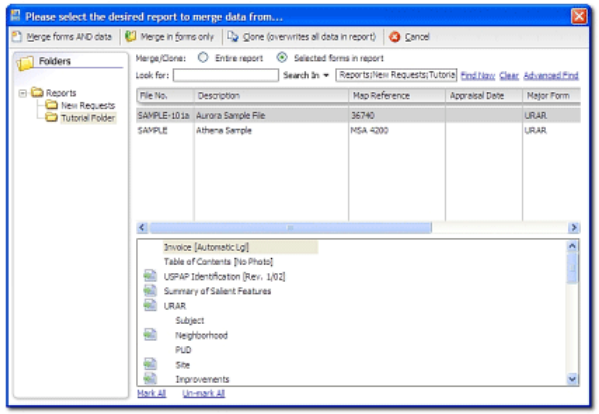


5. When you're finished, click **Save** to update your internal status.

Merge in Report Data

WinTOTAL's SmartMerge function takes the place of the clone function provided in older versions of WinTOTAL, placing far more data merging power into your hands as you begin your reports. WinTOTAL now allows you to merge data from individual sections of forms, as well as the whole form or the whole report at any time during the life or your report. You can even merge multiple different reports with different sections of each report you merge to help speed up your formfilling process without any concern about any data being overwritten. Merge simply blends the data you select with the data you've already placed into your report. To merge in data from another report or template…

1. In WinTOTAL's Order PowerView, click **Merge** in the toolbar at the top of the **Order** PowerView.



2. Find and click to select a report from which you wish to merge data. If necessary, use the **Look for** field to locate the desired report or "template" file.

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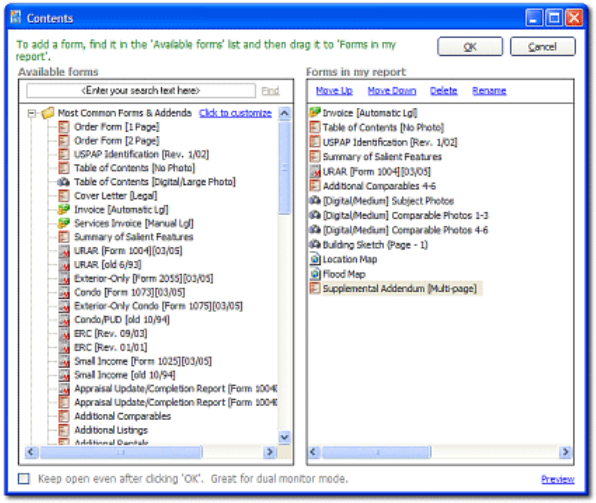
3. Indicate whether you want to merge the **Entire report** or just the Selected **forms** in your report by marking the corresponding option.
4. If you choose to merge in just selected data from your other report, the forms contained in that report are displayed below the file list. Double-click each form in this box to select or deselect it for inclusion in your new report. Click **Mark All** to select all of the forms in the report.
5. Once you've indicated what you want to merge from your old report, click one of the buttons in the top toolbar to tell WinTOTAL how to blend that data into your current report. Options are:
   - **Merge in forms AND data** – Blends the selected data into the data that already exists in your report, adding new forms to your report when necessary.
   - **Merge in forms only** – Adds blank copies of the forms you've specified into your current report. As with other merge options, this option does not overwrite the data in your report.
   - **Clone** allows you to make an exact duplicate of the older report. Any information you entered in the order form is overwritten with the data from the older report. If desired, click the check box to ensure that any tracking data (order date, etc) is not deleted.
   - Merge in forms only allows you to merge the forms from the older report, but without the data in them.

Add Forms to Reports

Adding additional forms into your report is simple. Just use the contents view to navigate out to the forms you want, drop them into your report, organize them, and you're done. Specifically, to add forms to your report…

1. From either the Forms PowerView or the Order PowerView, click **Contents** in the toolbar.



2. From the **Contents** window, find the form you want to add in to your report. Depending on your preferences, you can find forms in one of several ways.
   - You can search for the form by typing a search phrase into the provided box and clicking **Find**. If you want to search by form number, type a **#** sign followed by the form number without any spaces and then click **Find**.

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- You can scroll through the forms list and find the form based off of the folder organization. Just double-click any folder to expand it and show the available forms.
- You can customize the **Most Common (Custom) forms** list to show your list of needed forms and simply jump to that when you access contents. If you want to customize your Most Common Forms list, click the **Click to Customize link** and add in your favorite forms.

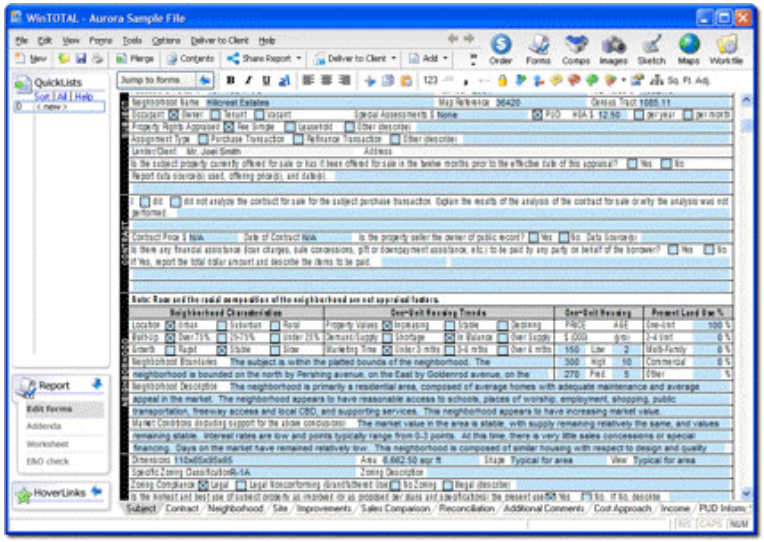
3. If necessary, click the **Preview** link to the lower right corner to see a live preview of the selected form.
4. When you locate the desired form, double-click it to add it to your report, or click and drag it across.
5. On right side, the forms currently in your report are displayed. You can change the order of these forms by dragging them up or down the list. Or, use the **Move Up** and **Move Down** links.
6. To remove a form from your report, select the form and click **Delete**. Do not double-click the form in this case, as that switches WinTOTAL to the **Forms** PowerView with that form open.

> **Note**: If you're removing a comps, rentals, or listings page, you must remove the forms in reverse order (i.e. a listings 1-3 page can't be removed before a listings 4-6 page).

7. If desired, you can change the name of this form for this report. Select the form and click the **Rename** link. Type a new name and click **OK**. Renaming the form here does not affect the default form name, but it is reflected in any future reports you may create by merging this report.
8. At the bottom of the window is the option to keep the contents window open even after you click **OK**. If you have dual monitors or a particularly large display area, you may want to select this option so you can continue to add forms as necessary without calling up the **Contents** again.
9. Click **OK** to return to the order form.

Forms PowerView

Arriving at the value of a property is only one step in the appraisal process. The tedious task of creating the actual report can often consume as much or more time from an appraiser's day. There are dozens of tools available to appraisers to help reduce the amount of time spent filling out the appraisal forms. The **Forms** PowerView is the spot in WinTOTAL where you'll perform a majority of your formfilling tasks.



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Navigate Forms

WinTOTAL's Forms PowerView provides a number of ways to help you easily navigate through your forms to the right fields in your report. Ways to jump around in your report include:

- **Collapsing/Expanding Forms** – You can collapse all of your forms into nothing more than headers, by clicking **Collapse All Forms**, expand all the forms in your report by clicking **Expand All Forms** or expand/collapse each form individually by clicking the icon beside the header of each form you want to toggle.
- **Jump Directly to a Form –** If you know exactly which form you need, click the **Jump to Forms** menu in the top toolbar and pick a form to jump directly to it.
- **Jump Directly to a Section** – If you need to quickly access a specific section of your major form, click the tab at the bottom of the screen that corresponds to the section you want to access.
- **Moving from Field to Field** – Just as you can move about your forms in several ways, there are several ways you can move from field to field. Pressing **Enter** moves your cursor from field to field in the "logical" order in which you might fill out the form. Pressing **Shift + Enter** moves you backward in that order. Pressing **Tab** moves you across the form horizontally, where possible, or to the next "logical" field if you're at the right edge of the form. Pressing **Shift + Tab** moves you backward, horizontally.

Control Your View

WinTOTAL provides a number of ways to help you maximize the viewable area of your report on screen while providing each access to the same tools you need throughout your report. To arrange WinTOTAL for best use of screen real estate, click the **View** menu in the Forms PowerView and select the appropriate option for your needs. Options include:

- **Zoom to full width** – Zooms in on the form until the entire form fits within the viewable area in the WinTOTAL window. As you resize your window, the form changes size to accommodate your new window size.
- **100% -** Zooms in on the form until it's displayed at its full width and height defaults.
- **Zoom –** Calls up the Zoom window so you can choose the exact zoom setting for your needs.
- **Show Left Pane** – Toggles the left pane on and off. You can also toggle this setting by pressing **F9** on your keyboard.
- **Show form icons –**Controls the field specific icons that appear while you're filling out your forms and that assist you in doing various things like picking a date from a calendar, managing your contacts, getting a map, etc. You have three options you can apply to these icons: **Always show**, **Current field**, and **Never show**.
- **Hide all QuickNotes** – Hides all your QuickNotes from view.
- **Show QuickNotes –** Allows you to specify which QuickNotes you want to see on screen.

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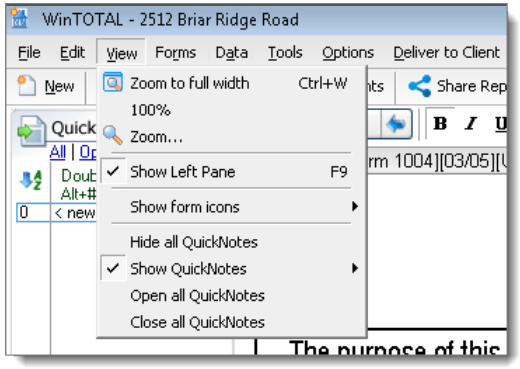
- **Open all QuickNotes** – Displays all of your QuickNotes for this report and opens the "sticky notes" so that you can edit them.
- **Close all QuickNotes** – Closes all "sticky notes" beside your QuickNotes, but leaves their respective balloon icons visible.



Formfilling Shortcuts

WinTOTAL's Forms PowerView contains a series of icons and tools within many of your forms that can help you to fill them out with the appropriate data more quickly. By default, these icons are nested next to each field that pertains to the data they help retrieve, but if you want to disable these icons, you can do so by clicking **View, Show form icons, Never show** from the menus at the top. Keep these features in mind as you fill out your forms.

- QuickLists are available to help you fill out entire sections of a form at any given time.

Hint: With a bit of forethought, QuickLists can be a great way to quickly fill out subject data that relates to a specific neighborhood. In other words, if the neighborhood characteristics in your area are similar enough, you may want to create and use QuickLists that fill out the related fields with specific neighborhood information about each neighborhood in your area, depending on which neighborhood QuickList you use.

- SmartMerge is available to help you merge in data from previous reports. Unlike cloning, you can do this as many times as you want without overwriting data that you've already entered in your report.
- As you fill out fields in your major form, WinTOTAL takes the relevant information from that field and applies it throughout other forms in your report to help you save time.
- In any field that contains the or icon, you can select data from or add entries to your Contacts Database.
- In the field that contains the icon, you can automatically insert a location map, flood, and census data into your report when you click the icon.
- When the » icon appears in a field, click it to designate that the content of that field is the same as either the Internal Order, Lender Case, Client File or FHA/VA case numbers.
- When the icon appears in a field, this indicates the presence of a "recent response" entry. Use your mouse and click the icon to display the list of your most recent entries in that field. Or, press **Alt + Down Arrow** on your keyboard.

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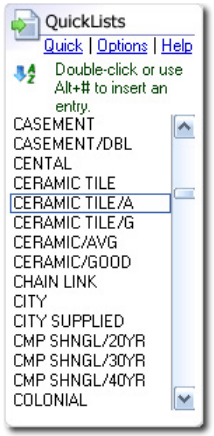
- If you've enabled FreeForm UAD mode in WinTOTAL's Data Entry Options, you'll be able to use shorthand entries to speed up formfilling. Click here for a complete reference on using the FreeForm UAD shorthand.

QuickLists



WinTOTAL's QuickLists system is both one of WinTOTAL's most powerful features and also one of its least understood features. Using QuickLists you can eliminate the need for repetitive typing for good and, with the proper setup, you can complete entire fields or even entire sections with a single keystroke. And since QuickLists are field-specific, you don't have to scroll through long lists to find the appropriate comments.

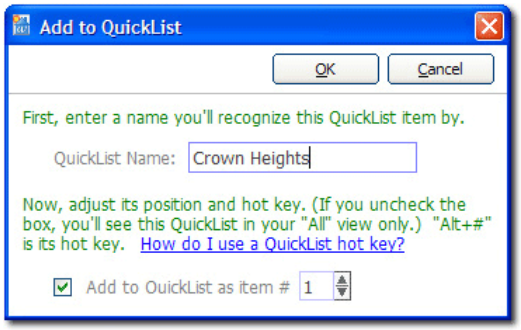
There are two different types of QuickList entries you can create in WinTOTAL: single-field entries and multi-field entries. Single entries provide a simple tool for stocking your common line item responses. Multi-field entries, on the other hand, provide you with a way to stock entire sections of a form into a single QuickList. Generally, you can achieve the best results through a blend of line item QuickLists and multi-field QuickLists.

When using QuickLists, the first step is to create your custom list of "canned" responses. Then, you can use them in your report, organize them for easier access, or share them with others in your office.

Create Line Item QuickLists

To create a QuickList entry…

1. In the Forms PowerView, place your cursor in the field you wish to create a QuickList for and type the comment.
2. Double-click **New** in the **QuickList** pane or press **Alt-0**.


Add to QuickList
OK
Cancel
First, enter a name you'll recognize this QuickList item by.
QuickList Name: Crown Heights
Now, adjust its position and hot key. (If you uncheck the box, you'll see this QuickList in your "All" view only.) "Alt+#" is its hot key. How do I use a QuickList hot key?
Add to QuickList as item # 1

3. Type a name for this entry and click **OK**.

Your comment is added to the QuickList for this field. Now, whenever you enter this field, the comment you saved appears in the QuickLists pane on the left.

Create Multi-field QuickLists

While line item QuickLists can help you quickly get through a section in your report, you can often speed that process further by creating multi-field QuickList entries that detail

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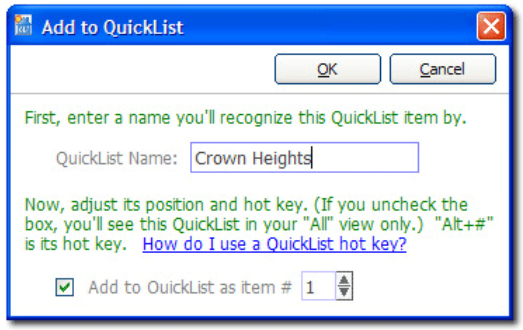
every field in a section for a certain builder or neighborhood. To create a multi-field QuickList entry…

1. From the Forms PowerView, select all of the fields you want to add into your QuickList entry starting with the field into which you want to add this QuickList. To select multiple fields, either hold down the **Ctrl** key and click each individual field you want to add or hold down the **Shift** key and click the first and last fields in a section of contiguous fields to select the entire section.
2. Double-click **New** in **QuickList** pane or press **Alt-0**.


Add to QuickList
OK
Cancel
First, enter a name you'll recognize this QuickList item by.
QuickList Name:
Crown Heights
Now, adjust its position and hot key. (If you uncheck the box, you'll see this QuickList in your "All" view only.) "Alt+#" is its hot key.
How do I use a QuickList hot key?
Add to QuickList as item #
1

3. Type a name for this entry and click **OK**.

Your new QuickList entry then appears in the QuickLists pane for the first field you selected. To help you differentiate between your new multi-field QuickList entry and the rest of your line item QuickLists, WinTOTAL notates any multi-field QuickList entries with an orange background.

Use QuickLists

Once you've created a QuickList, you can easily use it when filling out your forms.

Quick vs. All QuickLists

WinTOTAL allows you to filter your QuickLists so that you can view either All QuickLists in your text database, or just the QuickLists that apply to the currently selected form field. To switch between the two views, click the link in the upper left of the **QuickLists** pane. Depending on your current QuickLists view, the link says either "Quick" or "All" to indicate the view you will switch to when you click it.

Basic QuickList Usage

To use a QuickList entry...

1. In the Forms PowerView, place your cursor into the field in which you intend to use the QuickList entry.
2. Double-click the QuickList entry in the **QuickLists** pane.

   --OR--

   Hold down the **Alt** key on your keyboard and press the number on your keyboard that you see listed in the **QuickLists** pane to the left of the entry you want to use.

The QuickList entry immediately fills out your form with the data you saved into it.

Advanced QuickLists Options

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If you need to specify exactly where WinTOTAL inserts the QuickList entry in your field, you must use the advanced QuickLists entry options. To do so…

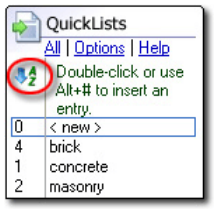
1. In the Forms PowerView, right-click the QuickList entry you want to use.
2. From the menu that appears, select the item you want to use. Options are…
   - **Replace Current Field Text with QuickList** – Overwrites the information you currently have in your form field with the data in your QuickList entry.
   - **Insert QuickList into Current Field Text** – Inserts the data in your QuickList entry into the existing content in your field at the location of your cursor in the field.
   - **Append QuickList at the End of the Current Field Text** – Adds the QuickList entry's data to the end of the current form field's data.
   - **Change Text Database Name** – Offers you a list of alternate WinTOTAL user profiles containing QuickList entries so that you can switch your QuickLists to use another user's.
   - **Create New Text Database** – Opens the QuickLists manager, allowing you to create a new set of QuickLists and associate the new list with any WinTOTAL user profile.
   - **Resequence QuickList** – Calls up WinTOTAL's QuickList reordering tool so that you can change the order of the QuickList entries for the currently selected field. This only applies for fields that have multiple QuickList entries.

Organize QuickLists

As you continue to use your QuickLists, you may need to reorder them to move more common QuickList entries into the top 10, move infrequent QuickList items out of the top 10, or to remove gaps in the numbering. There are two ways you can reorder your QuickLists: alphabetically and manually.

Organizing QuickLists Alphabetically

If you want WinTOTAL to automatically reorder your QuickLists alphabetically by the name of each QuickList entry, from the Forms PowerView, click the **A-Z** icon to the upper left of the **QuickLists** pane.



Organizing QuickLists Manually

To manually specify the order and numbering of your QuickList items…

1. In the Forms PowerView, right-click any QuickList entry in the **QuickLists** pane.
2. In the menu that appears, choose **Resequence QuickList**.
3. When the reordering window appears, click the QuickList entry or unassigned gap you wish to move.

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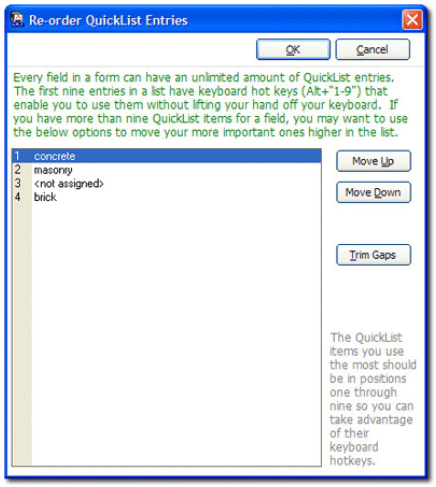
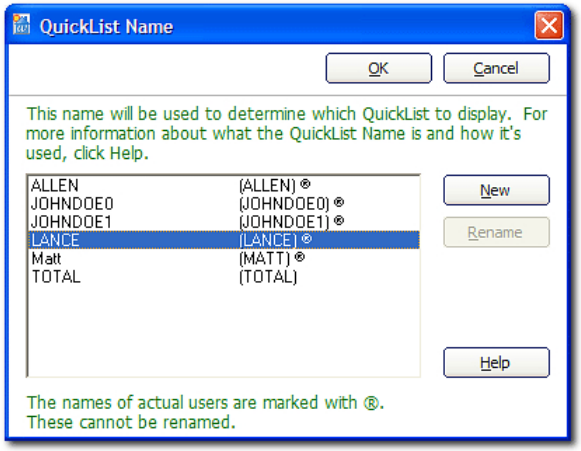

Re-order QuickList Entries
OK
Cancel
Every field in a form can have an unlimited amount of QuickList entries. The first nine entries in a list have keyboard hot keys (Alt+"1-9") that enable you to use them without lifting your hand off your keyboard. If you have more than nine QuickList items for a field, you may want to use the below options to move your more important ones higher in the list.
1 concrete
2 masonry
3 <not assigned>
4 brick
Move Up
Move Down
Trim Gaps
The QuickList items you use the most should be in positions one through nine so you can take advantage of their keyboard hotkeys.

4. Then, click the **Move Up** and **Move Down** links to position the QuickList entry as you see fit.
5. To remove the unassigned gaps from your QuickLists and automatically reorder the following QuickList entries to use the new space, click **Trim Gaps**.
6. Click **OK** when finished to save your changes.

Share QuickLists

Particularly if you're working in a multi-appraiser office and you're sharing WinTOTAL on a network, you may find times when your QuickList entries do not have all the info you want - particularly if you're new to WinTOTAL and haven't had the opportunity to create an extensive library of QuickLists. For just such occasions, we've added the ability for WinTOTAL users to share QuickLists with other WinTOTAL users in your network. If you have a set of QuickLists you want to share with others in your office network, you need not do anything. WinTOTAL shares them with the other members of your office by default. They simply need to swap their QuickLists set to use yours instead of their own. To switch your QuickLists set so you're sharing another WinTOTAL user's QuickLists…

1. In the Forms PowerView, click **Edit**, **Change Text Database name** from the menus.
2. When **QuickList name** window appears, you should see a list of the other WinTOTAL users on your computer or network.


QuickList Name
OK
Cancel
This name will be used to determine which QuickList to display. For more information about what the QuickList Name is and how it's used, click Help.
ALLEN (ALLEN) ®
JOHNDOE0 (JOHNDOE0) ®
JOHNDOE1 (JOHNDOE1) ®
LANCE (LANCE) ®
Matt (MATT) ®
TOTAL (TOTAL)
New
Rename
Help
The names of actual users are marked with ®. These cannot be renamed.

Note: You can also change the name of the Text Database for some of the users in the list by clicking **Rename**, typing a different name for that entry, and clicking **OK** This can help to clarify whose QuickLists you're viewing in the **QuickList name** window.

3. In addition, if you want to create a new blank database with no QuickList entries, click **New** and then type a name for your new database.
4. Click the name of the user whose QuickLists you want to use and then click **OK**.

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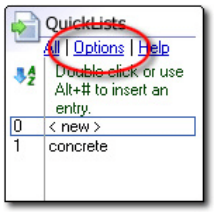
You're now using the QuickLists from the user you chose.

QuickLists Options

In addition to creating and sharing QuickLists, you can customize your QuickList preferences in several ways to tailor them to your needs. To change your QuickLists preferences…

1. In the Forms PowerView, click the **Options** link in the **QuickLists** pane.



2. From the menu that appears, select the item you wish to use. Options are:
   - **Create New Text Database –** Opens the QuickLists manager, allowing you to create a new set of QuickLists and associate the new list with any WinTOTAL user profile.
   - **Show Entries for this Name Only –** Filters the list of QuickLists appearing on screen to show only QuickList entries that belong to your current Text Database. This option only applies when you set your QuickLists view to **All** instead of **Quick**.
   - **Show this Form's Entries Only -** Filters the list of QuickLists appearing on screen to show only QuickList entries that apply to form you are editing. This option only applies when you set your QuickLists view to **All** instead of **Quick**.
   - **Change Text Database Name –** Shows a list of other QuickLists profiles along with a notation indicating the total number of QuickLists in the set that apply to the current field along with the total number of QuickLists in the set. The number on the left shows the total number of QuickList entries in the set for the selected field. The number on the right shows the total number of QuickList entries in the set. Click a name in the menu that appears to change your QuickLists set to the other Text Database entry.
   - **Clear Text Database Entries for Current User –** Flushes out your Text Database so that you can start your list over from scratch. Only click this option if you intend to wipe out your QuickLists.
   - **More Options –** Calls up the Data Entry Options in WinTOTAL's Configure WinTOTAL utility.

Recent Responses

WinTOTAL's Recent Responses system automatically stores the last 10 entries you place into each field on your forms into temporary storage so that you can access those responses again as you continue working up future reports. This system can save you some typing time from one line item to the next, but is not quite as powerful as our QuickLists system. Since this system is automatic, you need only fill out your reports to create new recent response entries. WinTOTAL then stores those 10 recent entries into drop-down menus that appear in each field.

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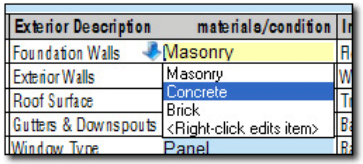
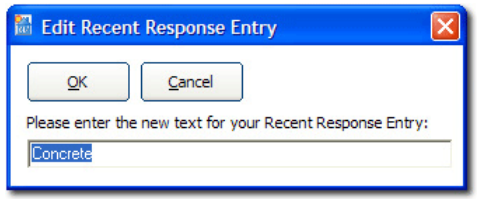


If you prefer to use our QuickLists system for data entry but you'd prefer to use the drop-down menus to select your desired QuickList response instead of the QuickLists pane or shortcuts, you can actually swap out the recent Reponses in the drop-down menus for QuickLists. For details on this process, see the Swap Recent Responses & QuickLists section of this user's guide.

Edit Recent Responses

While the Recent Responses are saved for you automatically as you type, you can also edit the entries.

1. In a report, place your cursor in any field containing recent responses and click the icon to display the list.
2. Right-click any of the responses in the list.
3. In the menu that appears, choose an option to apply your changes. Options include:
   - **Edit Recent Response** – Click this option, type a correction into the screen that appears, and click **OK** to save your changes back into the Recent Responses list.

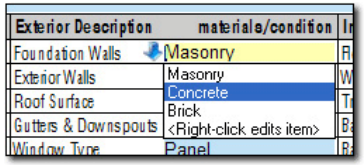


   - **Remove from Recent Responses –** Click this to remove the item from your drop-down list.
   - **Add to QuickList –** Click this, type a QuickList name, and click **OK** to transfer the recent response item directly to your QuickLists for this field.
   - **Use –** Click this to apply the recent response entry to the current field.

Note: Even though you edit a recent response item, if you continue to type new items into that field, your edited text may eventually by forced off the list by new entries. Remember that recent responses only remember the last 10 entries.

Use Recent Responses

Once you've entered text into a field in a report, the next time you visit that field, you see an icon indicating that recent responses are available. Click the icon to display the list or simply press **Alt + Down Arrow** on your keyboard. Select the desired entry from the list to insert it into the field, overwriting any text that already exists.



Hint: While selecting an item from the recent response gives you a visual clue as to the items available, you don't actually have to use the drop-down menu. Just start typing into a text field. If there is a recent response entry that begins with that letter, it automatically appears. Then, press **Down Arrow** and **Enter** to select that item.

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Swap Recent Responses & QuickLists

If you like the functionality of the recent responses, but would rather use your QuickLists instead, you can turn off the recent responses feature and replace the drop-down menu with QuickLists.

1. From the Forms options of WinTOTAL's configuration utility, verify that the **Show drop-down lists for fields** item is checked, then below that, mark the option for **QuickLists**.
2. If you'd like, check the box to **Automatically show drop-down lists when entering a field**. With this enabled, whenever you enter a field with a recent response or QuickList associated with it, the drop-down menu appears immediately.
3. Click **Save** to complete the change.

QuickNotes

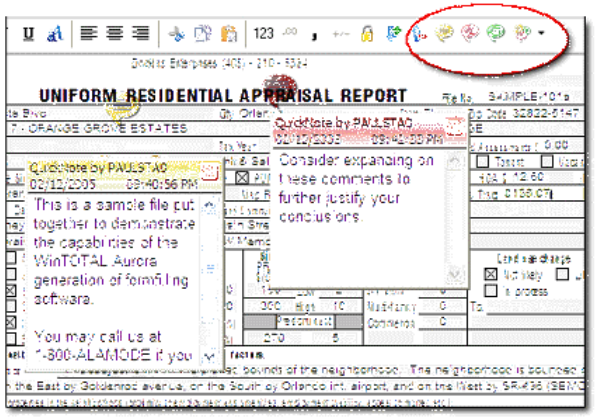
In the past, one of the advantages to a printed form was that you could attach a note to it if you wanted to convey some information about the report for another appraiser. In extreme cases, review appraisers could often attach enough of these messages that it was hard to see the report behind the notes. Now, WinTOTAL lets you leave electronic "sticky notes" anywhere on any form. These notes display on screen, but do not show up on the printed copies. They make a great teaching tool, as mentors and reviewers can point out minor items, as well as critical errors.

QuickNotes are available in three levels

- Standard (Yellow)
- Needs Review (Red)
- Reviewed (Green)

To create a QuickNote…

1. In the Forms PowerView, click the note icon of choice (Yellow, Red, Green) in the toolbar above your form.


UNIFORM RESIDENTIAL APPRAISAL REPORT
Consider expanding on these comments to further justify your conclusions.
This is a sample file put together to demonstrate the capabilities of the WinTOTAL Aurora generation of form filing software.
You may call us at

2. Click the area of the form where you want note to appear.
3. Type your comments in the box that appears.
4. Click the **X** in upper right corner to close and save your note.

The note is placed in your document shown as a semi-transparent balloon.

- If you need to reposition the note, just click and drag the balloon to another location.
- To read a note, double-click the balloon.
- To change the type of note, right-click the balloon, then choose **QuickNote Type** and select the desired note type.

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- To remove a note from your report, right-click the balloon and choose **Delete**.
- To choose how QuickNotes are displayed in the report, click the **Show QuickNotes** icon and select whether to hide all notes, display only those of one kind, expand all notes in the document, or collapse them all.

Default Data & Formatting

Aurora, like Athena, allows you to customize the data, fonts, and formats you use in WinTOTAL to comply with the common formats, fonts, and data you prefer to use as you fill out your reports. Using WinTOTAL's data and formatting tools, you can adjust the font or field format that WinTOTAL uses by default and you can even add default data to specific forms so that you can avoid retyping data unnecessarily.

Set Default Fonts

WinTOTAL can store custom font formatting such as italics and font size to use throughout your forms. This can come in handy if you need to keep the font styles consistent throughout your report. To use custom formatting:

1. In the Forms PowerView, open the form you need and make adjustments to the formatting in any fields that require it.
2. Click the **Form** menu and choose **Default data fonts**. You then have 2 options:
   - **Set default form data font** – This allows you to specify the font that is used to fill out all the forms in your report.
   - **Set default addenda data font -** This allows you to specify the font that is used to fill out the addendums in your report.

Save Custom Formatting

WinTOTAL can store custom formatting such as text alignment, rounding, commas, etc… This can come in handy if you continually have to use the **F6** key to override our default settings or are always customizing the formulas. To use custom formatting…

1. In the Forms PowerView, open the form you need and make adjustments to the formatting in any fields that require it.
2. Click the **Form** menu and choose **Default field formats**. You then have 3 options:
   - **Save formats as new default** – This saves the formats currently in the form as that form's default to preload on all new files.
   - **Load default formats** - This merges the default formats with the current information in the report and does away with your custom formatting.
   - **Restore standard default formats** – This resets the default formats with the original information that shipped with WinTOTAL.

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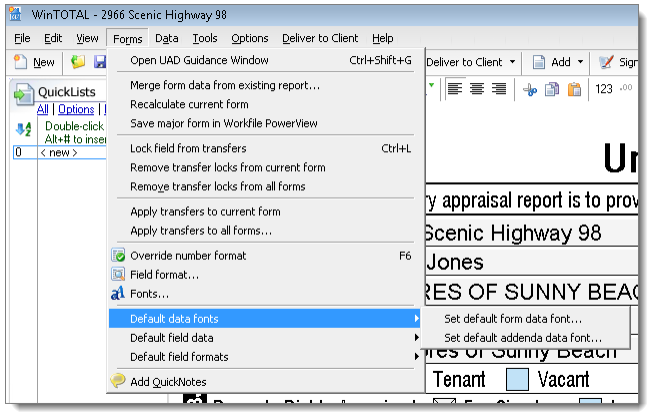
Set Default Data

Default data is information that is automatically loaded into a form the first time it is used in a report. It can be useful for changing the headings on addenda forms or adding terms to your invoice forms. To use default form data:

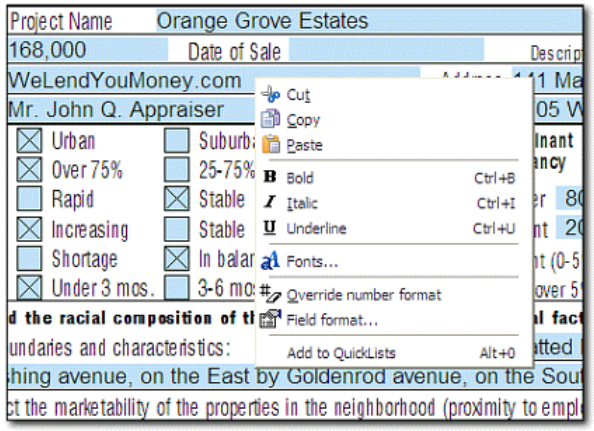
1. In the Forms PowerView, open the form you need and make adjustments to the formatting in any fields that require it.
2. Click the **Form** menu and choose **Default field data**. You then have 3 options:
   - **Save data as new default** – This saves the data currently in the form as that form's default to preload on all new files.
   - **Load default data** - This merges the default data with the current information in the report.
   - **Restore standard default data** – This resets the default data with the original information that shipped with WinTOTAL.


WinTOTAL - 2966 Scenic Highway 98
File Edit View Forms Data Tools Options Deliver to Client Help
Open UAD Guidance Window Ctrl+Shift+G
Merge form data from existing report...
Recalculate current form
Save major form in Workfile PowerView
Lock field from transfers Ctrl+L
Remove transfer locks from current form
Remove transfer locks from all forms
Apply transfers to current form
Apply transfers to all forms...
Override number format F6
Field format...
Fonts...
Default data fonts
Default field data
Default field formats
Add QuickNotes
Set default form data font...
Set default addenda data font...
Tenant
Vacant

Field-specific Formatting

Just as you can in previous versions of WinTOTAL, you have the option to format individual fields within any given form. To change the formatting for a field…

1. In the Forms PowerView, open the form you need and right-click a field you'd like to reformat.



2. In addition to traditional word processing commands, you can also use the following commands:
   - **Fonts** – This allows you to change the field's font style
   - **Field format** – This allows you to change various formatting options for the field.
   - **Override number format** – This overrides a default number format so that the field accepts whatever data you enter into it.
3. If you chose **Fonts**, simply choose the font type, size, style, and colors from the appropriate fields and click **OK** when you're finished. Notice that as you change your

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font effects you can preview them in the preview pane to the bottom right of the window.

4. Alternately, if you chose **Field format**, you have the following options:
   - **Read Only** – Only allows you to read a field and does not permit manual changes to a field.
   - **Invisible** – Hides the field and its data from view.

     Note: This option only applies for some fields.
   - **Non-Printing** – Designates that a field should not print with the rest of your form data when you choose to print your report.
   - **Skipped by Enter** – Causes WinTOTAL to skip this field when you travel consecutively through the fields in your report using the **Enter** key.
   - **No Calc** – Prevents WinTOTAL from calculating this field. This can be particularly handy when you enter data into a field that would normally resolve the data to some calculation, but you do not want that to happen.
   - **Numbers Only** – Prevents you from typing letters and other non-numeric characters into the field.
   - **2 Decimal Places –** Limits the number of decimal places in a number field to 2.
   - **Show Commas** – Toggles commas in numeric fields on and off.
   - **Leading + or - -** Requires a leading + or – in the field such as in the comps grid.
   - **No Transfer In –** Toggles field locking on and off.
   - **Rounding –** Allows you to set rounding for numeric fields. The default option is **No Rounding**.
   - **Alignment –** Allows you to set your field alignment. The default option is **No Align.**

Add Documents to Reports

In previous versions of WinTOTAL, adding files to your report could be a complicated process. Now, WinTOTAL's new "Add Documents" feature allows you to add anything from a PDF to a scanned document to your report in a few simple steps. To add a file to your report…

1. In the Forms PowerView, click the down arrow next to the **Add** button. Files can be added to your report using one of four methods:
   - **Document from clipboard** – Copies the image currently in the Windows clipboard into your report file. This allows you to use Windows' copy and paste features to import image files into your report.
   - **Document from image** – Allows you to browse your computer for the file that you want to add.
   - **Document from scanner** – Allows you to scan a hard copy of a document directly into your report.

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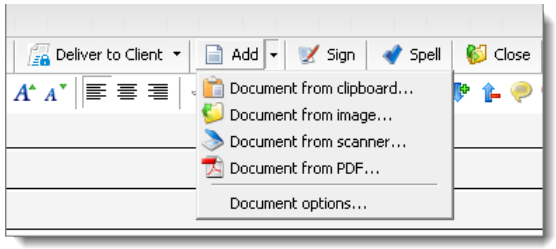
- **Document from PDF** – Allows you to import PDF files directly into your report.

2. Click the option that corresponds with the source of the file you want to import. Then, WinTOTAL prompts you about the type of form you'd like to use to import this data.



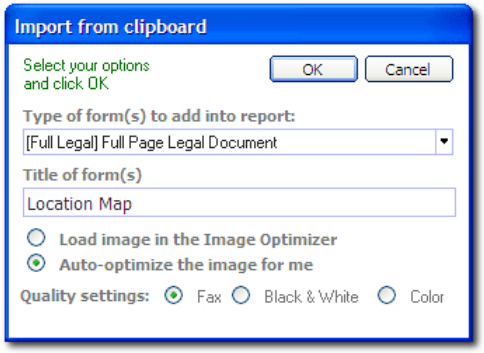
3. Choose a form type that suits your preference and then type a title that reflects the file you're importing.

4. Finally, choose an appropriate image quality using the **Quality settings** options and then click **OK** to import your file.

Document from Clipboard

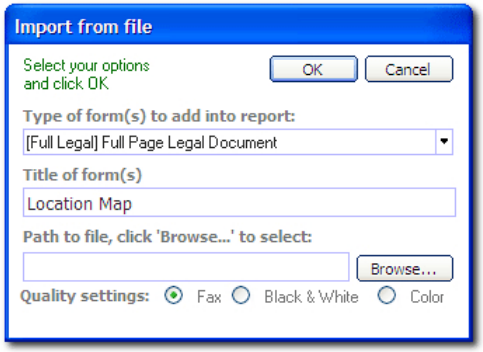
When you use this option to add a document to your report, WinTOTAL automatically pulls the latest image you've added to the Windows clipboard into your report. In addition to the general steps outlined above, you need to specify whether or not you'd like to send the image to the image optimizer before adding it to your report. To do so, simply mark the option that corresponds to your choice.

Note: If you have not copied an image to the Windows clipboard, this option generates an error when you choose it.



Document from Image

When you use this option to add a document to your report, WinTOTAL prompts you to browse for the file you wish to add. In addition to the options outlined above, you need to click **Browse** and **Open** the file that you wish to add before clicking **OK**.



Document from Scanner

By using this option to add a document to your report, WinTOTAL automatically starts your scanning software.

Note: You must have your scanning software installed to use this option. Furthermore, since your scanning software is unique to your scanner, if you have difficulties using this option, you should contact your scanner manufacturer.

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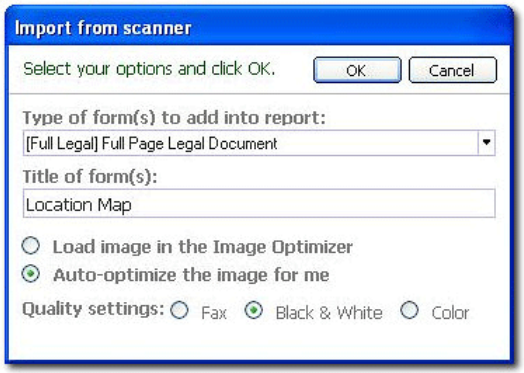
1. Once the scanning software loads, it takes control from WinTOTAL, so you must use it as directed by the manufacturer to scan or acquire the image. Usually, you click **OK**, **Close**, **Save, Scan** or **Send** to in order to send the image to the "host" application – in this case, WinTOTAL. If you're scanning software has no such option, it should send the image to WinTOTAL.
2. Once the image has been sent to WinTOTAL, an **Import from scanner** screen appears prompting you with specific options. Choose a type of form to insert the scanned document into and type a title for the form in the available box.



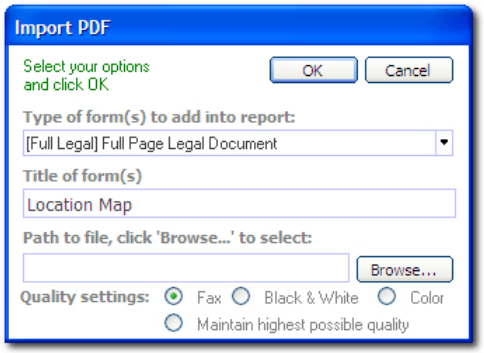
3. Remember to choose either to automatically optimize your image using your pre-defined settings or to manually optimize the image by marking the appropriate option.
4. Finally, choose a **Quality Setting** for your document and click **OK** to import it into your form.

Document from PDF

When you choose this option to add a document to your report, WinTOTAL allows you to browse for and add a PDF document to your report. It then converts the PDF into an image file that can be used in a WinTOTAL form or even optimized and annotated as with any other image file in WinTOTAL.

1. Choose a type of form into which WinTOTAL should insert your PDF.
2. Type a title for the form into the available box.
3. Click **Browse** to navigate out to the PDF file on your computer. When you find the PDF file, click it and choose **Open**.
4. Finally, choose the **Quality Setting** you wish to use on your PDF and click **OK** to convert the PDF into an image that can be used in a WinTOTAL form.

Note: In addition to the standard fax, black & white, and color quality settings in the other options, this option includes an option to maintain the highest possible quality during the process of converting the PDF into an image file. Use this option only as necessary because it can increase your report's overall file size significantly.



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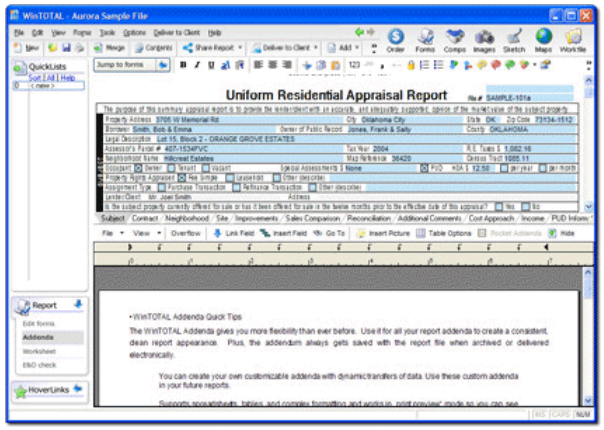
Write Addenda

WinTOTAL's addenda feature gives you unparalleled power in creating narrative supplements to your appraisal reports. Based on proven word processing technology, the Addenda feature gives you access to most of the advanced tools found in products like Microsoft Word, including tables. In fact, you can load documents created in your word processor directly into an addendum. But WinTOTAL's addenda tools give you one capability you won't find in MS Word: you can link any field from any form – or multiple forms – directly into your addendum. As your report changes, your addendum is automatically updated. To access WinTOTAL's addenda tools, click the **Addenda** button in the **Report** pane to the left of the Forms PowerView.



Create Addenda

In WinTOTAL's addenda tools, you can create addenda in three different ways.

- **Text Overflow** – As you're typing in any multi-line text field in a form, WinTOTAL knows how much text can fit in that field. Once you've reached that capacity, the program automatically prompts you to create an addendum. See the Text Overflow Options section of this user's guide for exact detail on generating addenda with this tool.
- **Select an Addendum Form** – If there's a particular addendum form you wish to use, you can simply add the form to the report using the **Contents** feature. Just add an addendum form from WinTOTAL's **Other Forms & Addenda** folder inside the Contents tool.
- **Split-screen addenda** – The quickest way to create an addendum. This method allows you to view the contents of your forms while you're editing your addendum. To use it, click **Addenda** in the **Report** pane.

Create Tables & Columns

Using WinTOTAL's addenda tools you can create tables to help you display structured lists or create columns in your document. To create a table in an addendum…

1. From WinTOTAL's addenda tools, click the **Table Options** button, and choose **Insert Table**.
2. Specify the number of rows and columns you would like to see.

> **Note**: There is no way to change the number of rows and columns for the table once it has been inserted into the addendum.

3. Click **OK**.

Once a table is inserted, you can begin typing text into each cell. Click and drag the borders of the table to resize each

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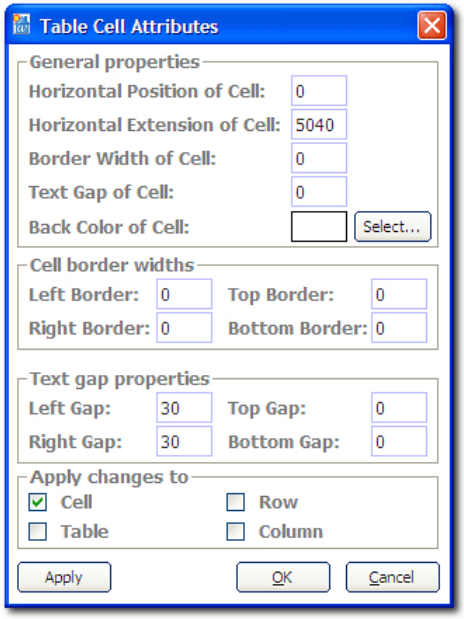
cell. To further customize the table, with your cursor in the table, click the **Table Options** button again and choose either **Table Attributes** or **Cell Attributes**. Select the desired modifications from the screen and click **OK**.

Cell Attributes

As necessary, you can adjust the formatting of any cell in your table to emphasize certain aspects about it. To adjust your cell's formatting…

1. From WinTOTAL's addenda tools, click the cell you wish to adjust and then either right-click it and select **Cell Attributes** OR click the **Table Options** button in the middle toolbar and select **Edit Cell**.



2. In the screen that appears, mark your preferred options and click **OK**. Options include:
   - **Horizontal Position and Extension –** The **Horizontal Position** and **Extension** dictate the left and right position of the cell.
   - **Border Width** - Controls the thickness of all four lines around the cell. Change any individual line by changing the width of that side in the **Cell border widths** section below.
   - **Text Gap** – Controls the space between each edge of the cell and the text. Fine tune the margins on any side by editing the values in the **Text gap properties** section below.
   - **Back Color** – Lets you select a background color for this cell from the drop-down list.
   - **Apply changes to –** While designed to modify one cell, you can apply the changes you make here to either the entire row, column or the table itself.

WinTOTAL immediately applies your changes to the cell. To undo these changes, click **Undo**.

Note: When entering values for the **Cell Attributes**, each point size equals 20. Thus, to put a line width of 2 points on the bottom of the cell, you would enter 40 in the **Bottom Border** field.

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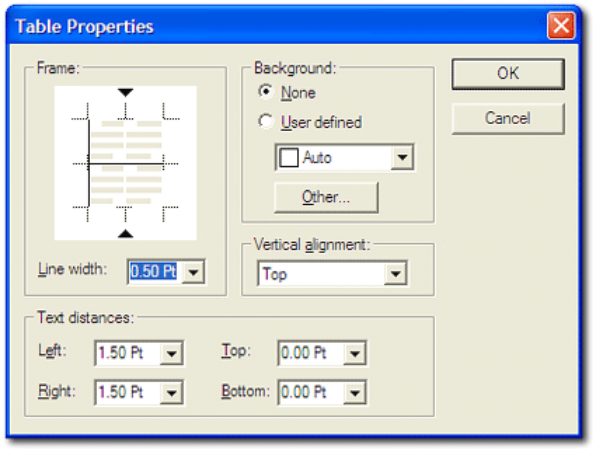
Table Attributes

As necessary, you can adjust the formatting of your table to emphasize certain aspects about it. To adjust your table's formatting…

1. From WinTOTAL's addenda tools, click the table you wish to adjust and then either right-click the table and select **Table Attributes** OR click the **Table Options** button in the middle toolbar and select **Edit Table**.



2. In the screen that appears, mark your preferred options and click **OK**. Options include:
   - **Line width –** From the drop-down menu, select the width for a line. Then, in the **Frame** display above, click the position for the line. Continue to add lines as needed.
   - **Background –** To change the color of your table, click the **User Defined** option, then choose color from the drop-down menu. Or click **Other** to define your own, custom color.
   - **Vertical alignment –** This setting controls where the text is placed in each cell of the table. Select **Top**, **Center** or **Bottom** from the drop-down menu.
   - **Text distances –** Use these settings to offset the text in your table from the edges. If you've used a thicker line style, you may need to increase these settings to ensure the text is separated from the edge.

Insert Images

As with any word processor, you add logos, pictures of properties or any other image to your addendum text. To add a picture to your addendum…

1. From WinTOTAL's addenda tools, click **Insert Picture** in the toolbar.
2. Browse to the directory where your image is stored, select the file and click **Open**.
3. Double-click the image to open the **Image Sizing** screen, from which you can use the slide bars to re-size your photo. To ensure you photo does not become skewed, make sure the **Retain aspect ratio** box is selected.

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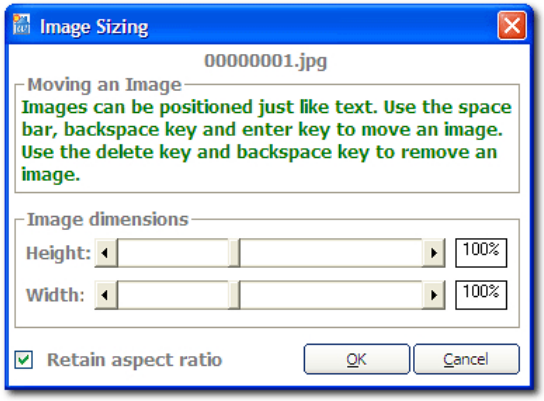


Image Sizing
00000001.jpg
Moving an Image
Images can be positioned just like text. Use the space bar, backspace key and enter key to move an image. Use the delete key and backspace key to remove an image.
Image dimensions
Height:
100%
Width:
100%
Retain aspect ratio
OK
Cancel

4.To delete a photo, simply click on it and press **Delete**.

Link to Form Fields

A key feature in WinTOTAL's addenda tools is the ability to place hot links to fields from your appraisal forms. These hotlinks pull information from the forms in your report to help you fill out your addenda. For example, instead of typing the address of "123 Main Street" you could link the address field in your report down into the addendum. The addendum would pull the address from the address field into your addenda, marking it in blue. Then, if you save the addendum and load it into another report, the address refreshes with the data from the new report. To create these hotlinks in your addendum…

1.In WinTOTAL's addenda tools, place your cursor in the addendum where you want to insert data from a report field.

2.In the form window, select the field whose data you want to include in the addenda. To find the right field, you can use **Collapse all** and **Expand all**, or **Jump to forms**.

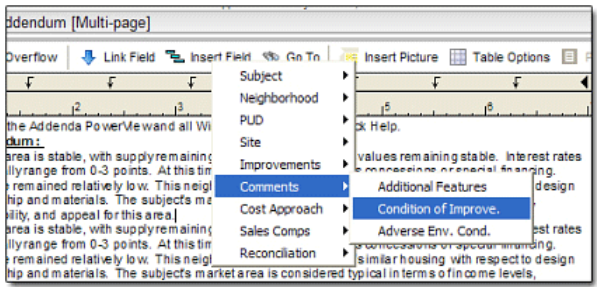
3.Once your cursor is in the proper field, click the **Link Field** button to insert the contents of the selected form field into your addendum.

The field data from the form transfers into the addenda. To demonstrate that it is a live link, change the field on the form and watch it change the addenda when your cursor leaves the field!

Hint: You can link fields from more than one form in your report. So you might link data from the main form, but also from an additional comps page, for example.

If you don't like scrolling around your forms in the split screen view, there is another way to insert fields from your report's major form:

1.From WinTOTAL's addenda tools, click the **Insert Field** button.



2.A menu appears showing the form's major sections. Click the section you would like to use.

3.Fields from that section are listed alphabetically. If an arrow is shown at the bottom of a list, use it to scroll down and see more fields. Click the desired field in the list and it should be inserted into your addendum.

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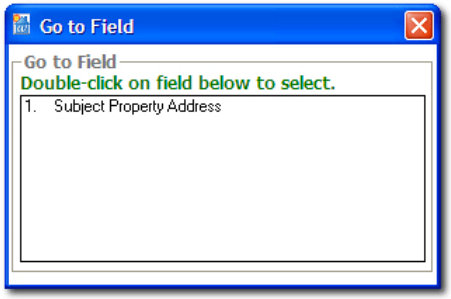
Navigate Addenda

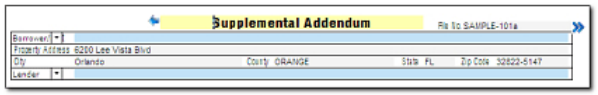
While you're WinTOTAL's addenda tools, there are a few features that you can use to move around and view your work.

Note:
These features are only accessible from the toolbar displayed when you select **Addenda** in the **Report** pane of the **Forms** PowerView. If you use the **Jump to forms** button to open your addendum, you won't see that link.

- While the screen is split, showing the form at the top of the screen and the addendum at the bottom, you have control over the size of each area. Move your cursor over the grey line seen just above the toolbar. When it changes to a double-arrow, click and drag the line up or down to change the size of the window panes.
- If you've used the **Overflow Text** feature to insert text from your form, or linked data from any fields, you can quickly locate these sections in your addendum. Click **Go To** in the lower toolbar. A screen displays all of the linked fields. Just double-click the desired link and you're taken directly to that section of the report.



- Each addendum form in your report has a header at the top of the page that conforms to the standard report formats used in other forms. To quickly view and edit this header, click the **View** menu in the lower toolbar, and then click **Page Header**. The header box appears immediately in the upper window pane.



- The **Ruler** is displayed by default to give you a guide for laying out your document. Use it to set tab stops and margins for your addendum.
  - **Tabs -** Click anywhere on the ruler to set a tab stop. Click and drag unused tabs off of the **Ruler** to delete them.
  - **Margins -** Margins are set by dragging the black triangles at either end of the ruler.
  - **Displaying the Ruler** – To toggle the ruler off or on, click the **View** menu in the lower toolbar and select **Ruler**.
- • You can switch from a normal, text editing view to a "what-you-see-is-what-you-get" view by choosing **Print Layout** from the **View** menu in the lower toolbar. Then, choose **Normal** to switch back.

Save Addenda

With the powerful formatting and ability to link live fields, you can build up a library of addenda to reuse in various reports. To save an addendum for later use...

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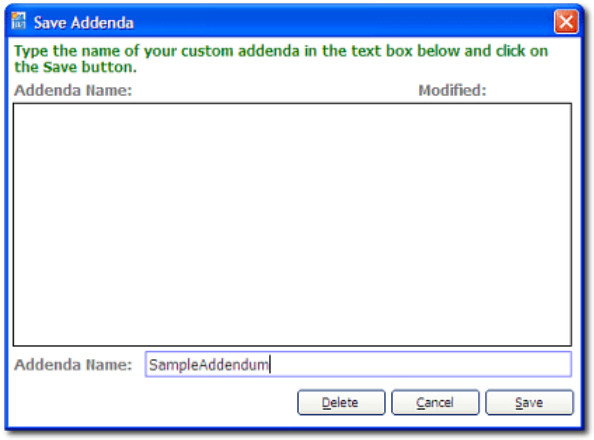
1. From WinTOTAL's addenda tools, click **File** in the toolbar just above the addendum.

> **Note**: Do not click **File** in the toolbar at the top of the screen.

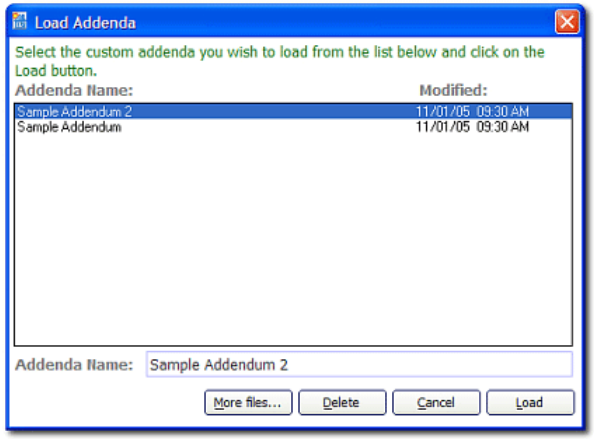
2. Click **Save**, type a name for your addendum in the **Addenda Name** box and click **Save**.



Use Existing Addenda

Once you've built your library of custom addenda, using them in your reports is a matter of a few clicks. To load a previously saved addendum…

1. From WinTOTAL's addenda tools, click **File** in the lower toolbar and choose **Load**.
2. Select the addendum you wish to use and then click **Load**. Your custom addendum should now appear in your report – replacing whatever addendum you had before. And any linked field in the addendum is updated with information from the current report.



> **Note**: When you load a new addendum, it overwrites the existing addendum in your report.

> **Hint**: The Load Addenda screen lists only the addenda files you created and saved in WinTOTAL. However, you can also load any MS Word or Text file into your addendum. From the screen that appears, click More files. Browse your system to find the desired file and click Open.

Text Overflow Options

As you're typing data into any multi-line text field, only a certain amount of text can fit when the report prints. Based on the field size and your default font, WinTOTAL knows how much information this is. When you exceed the limit, you're presented with a screen allowing you to move the excess text into an addendum.

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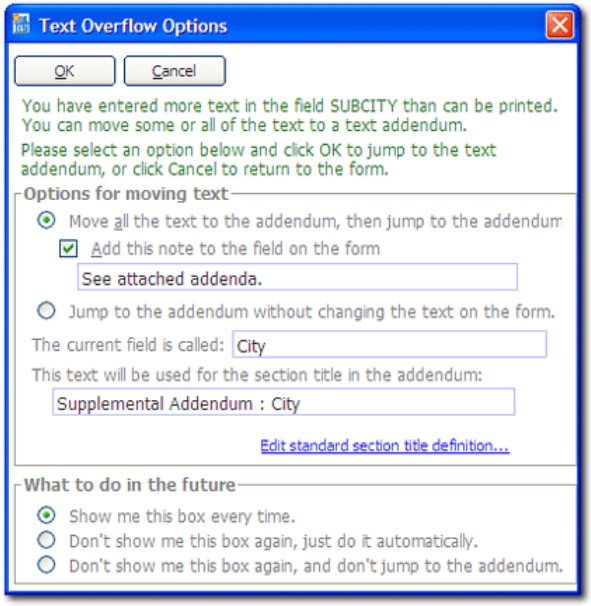
Text Overflow Options
OK
Cancel
You have entered more text in the field SUBCITY than can be printed.
You can move some or all of the text to a text addendum.
Please select an option below and click OK to jump to the text addendum, or click Cancel to return to the form.
Options for moving text
Move all the text to the addendum, then jump to the addendum
Add this note to the field on the form
See attached addenda.
Jump to the addendum without changing the text on the form.
The current field is called: City
This text will be used for the section title in the addendum:
Supplemental Addendum : City
Edit standard section title definition...
What to do in the future
Show me this box every time.
Don't show me this box again, just do it automatically.
Don't show me this box again, and don't jump to the addendum.

You can take advantage of WinTOTAL's overflow capabilities in two ways: automatically and manually. The automatic method takes care of itself. As you're typing, if you overflow a text field, the overflow tools launch asking you what to do. If you need to manually overflow a field, just place your cursor in the field, and then, from WinTOTAL's addenda tools, click **Overflow** in the addenda toolbar

There are two options for how the text in your form is treated when you overflow a field:

- **Move all the text to the addendum –** Mark this option if you'd like all of the text you've already typed moved to the addendum. In its place on the form, you can insert a descriptive phrase directing the reader where to look for the information. Check the box to enable this feature, and then type the desired phrase in the available box.
- **Jump to the addendum –** Use this option if you'd like the text you've already typed to remain on the form. The text is also copied to the addendum, where you can continue typing.

Whichever method you use, a new section heading is automatically added to your addendum. The heading for this section is displayed in two boxes in the **Text Overflow Options** screen. By default, the heading uses the name of the form the text is coming from, plus the name of the specific field. You can change this for each situation by editing the text in either field. Or, click the **Edit Standard section title definition...** link and enter new default text. You can enter any text you like, and choose a combination of the **Bold**, **Italic** and **Underline** links. Use the $F and $D wildcard to insert the name of the form and field, respectively, into the text. Click **OK** to store your new default text.

The final options let you select how you'd like the Text Overflow function to work in the future.

- **Show me this box every time –** As you'd expect, choose this option if you'd like to see the options screen every time you overflow a text field.
- **Don't show me this box again, just do it automatically** – When this option is selected, whichever settings you chose are executed automatically. You're not given the option of changing the settings.
- **Don't show me this box again, and don't jump to the addendum** – This option effectively disables the feature. If this is selected, when you overflow a field, you remain in the form. However, you are not able to add any more text to the field.

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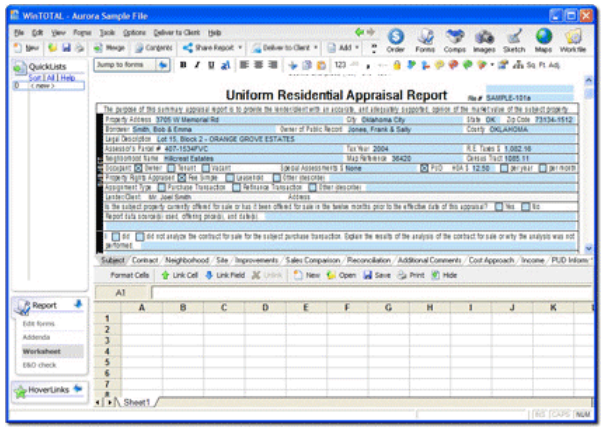
Worksheet Calculations

WinTOTAL includes numerous automatic calculations. And yet, there's no way that our programmers can anticipate everything you might want to calculate in the course of your appraisal. Luckily, WinTOTAL's worksheet feature allows you to take control and create sophisticated models using data from your reports. Based on industry-standard spreadsheet capabilities, WinTOTAL's worksheets can include mathematical and statistical formulas, as well as handle text manipulation. While worksheets do not print as part of your report, you can utilize calculated data by inserting it into your forms. To access WinTOTAL's worksheet features, click the **Worksheet** button in the **Report** pane to the left side of the Forms PowerView.



Create Worksheets

Worksheets can be created from scratch within WinTOTAL, or created in a Microsoft Excel-compatible application, then loaded into WinTOTAL. Some considerations to remember:

- Only one worksheet can be attached to a report. However, any worksheet can have multiple calculations in it.
- Worksheets can pull data from more than one form in your report.
- While primarily used to manipulate data, worksheets can also be used to simply transfer data from one field to another.

To create a worksheet, just load up WinTOTAL's worksheet tools. A worksheet automatically appears at the bottom of your screen for use. If you need to create a new blank worksheet for any reason, click **New**. Keep in mind, though, that creating a new worksheet erases the worksheet that's currently loaded in your report, so you should save your current worksheet before creating a new one.

Link Fields

Once your worksheet is open, you can link data from a form into any cell in the worksheet.

1. From WinTOTAL's worksheet tools, place your cursor in the worksheet cell where you want to insert data from a report field.
2. Select the field in the form that you want in the worksheet. You can use **Collapse all** and **Expand all**, or **Jump to forms**, to display the desired form.

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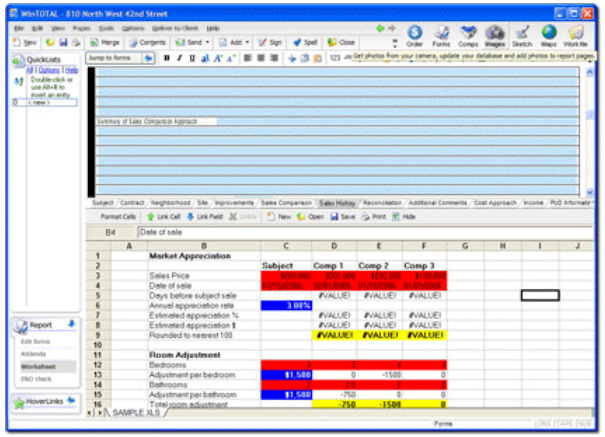
3. Click the **Link Field** button. The cell in your spreadsheet turns red to indicate it is a linked field.



Now you should see the field data from the form transfer into the worksheet cell. To demonstrate that it is a live link, change the field on the form and watch it change the worksheet when your cursor leaves the field!

Hint: You can link fields from more than one form in your report.

Taking data from your worksheet and inserting it into a form is just the reverse…

Hint: Not all formulas are as simple as adding two fields. WinTOTAL worksheets support most of the mathematical, statistical and text handling formulas found in MS Excel. If you're building a complex, multipart formula, it is often easier to create that formula in MS Excel. Then you can save the Excel spreadsheet and load it into WinTOTAL and create the desired links to and from your spreadsheet. This allows you to use Excel's formula help and troubleshooting tools to fine tune your formula.

1. From WinTOTAL's worksheet tools, place your cursor in the worksheet cell containing the data you want to place in your form.
2. Select the field in the form. Again, use **Collapse all** and **Expand all**, or **Jump to forms**, to display the desired form.
3. Click the **Link Cell** button. The cell turns yellow indicating that it is a linked field.

Enter Formulas

Entering formulas in a worksheet is the same as most spreadsheets. Begin a formula by typing the equal sign (=). Now, you can click in any other cell to use the contents of that cell in your calculation. For example, to add the contents of two cells…

1. In WinTOTAL's worksheet tools, select the cell that you want to contain the calculation and press the **=** key on the keyboard.
2. Click on the cell containing the first number you want to add, and then type the plus sign (**+**) on your keyboard.
3. Click on the cell containing the second number and press **Enter**. The sum of the two numbers then displays in the cell.

Note: The cells you're adding may be linked to data in your form or other cells in which you've manually entered numbers.

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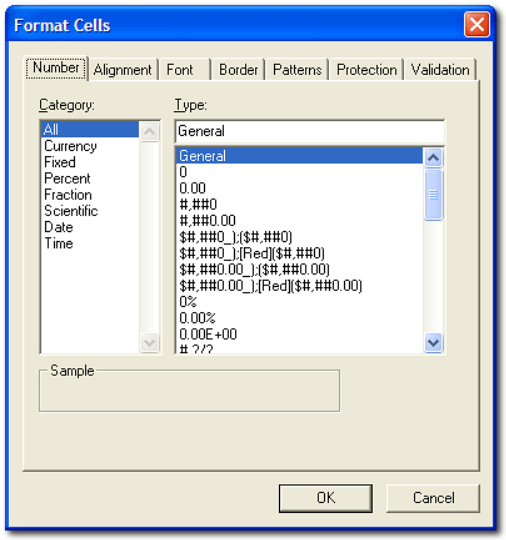
Format Worksheets

To add formatting to the cells in your worksheet…

1. In WinTOTAL's worksheet tool, select the appropriate cells, then click the **Format Cells** button. Or, right-click and choose **Format Cells** from the pop-up menu.
2. From the **Format Cells** screen, you can change several options. Click the desired tab at the top of the screen to change the **Number** formatting, cell **Alignment**, **Font**, cell **Borders**, fill **Patterns** or **Protection**. In addition, you can restrict the data entered in a cell by using the **Validation** tab.



Note: The cell formatting options are similar to the options found in MS Excel and most other spreadsheets. For specific help in using any of these options, consult your spreadsheet software manual.

3. Click **OK** to save your formatting changes.

Hint: Worksheets are not intended for print. Instead, these formatting options can be applied to make your worksheets easier to use. For example, since linked fields are colored red and yellow, you might color data entry cells blue. Also, to preserve your formulas from being accidentally overwritten or deleted, use the protection formatting. Finally, remember that formatting applied in the worksheet does not transfer up to the form.

Save Worksheets

WinTOTAL allows you to save copies of your worksheets so that you can load them into any future report. To save a worksheet…

1. From WinTOTAL's worksheet tools, click **Save** in the **Worksheet** toolbar.
2. Give the spreadsheet a name so you can identify it later, and click **Save**.

Use Existing Worksheets

If you've already created a spreadsheet in an application like MS Excel, or have one from a previous version of WinTOTAL, you can quickly load that into your current report. To do so…

1. First, in your spreadsheet application, save your work in an MS Excel 5.0 format.

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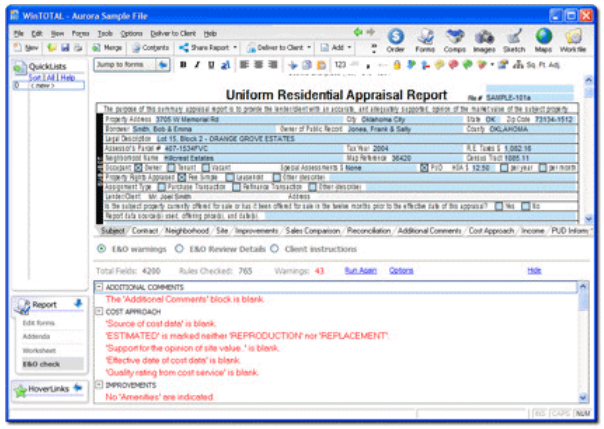
2. In WinTOTAL's worksheet tools, click **Open** from the **Worksheet** toolbar.
3. Browse your system and select the spreadsheet you wish to use, and then click **Open**. Your custom spreadsheet should now appear in the WinTOTAL worksheet – replacing whatever spreadsheet you had before.

Note: You can use copy and paste to get your spreadsheet from Excel into WinTOTAL, but when you paste, only the text labels are pasted in, so you have to copy your formulas individually.

Check E&O

Once your report is complete, click **E & O Check** in the **Report** pane of the Forms PowerView. This executes the built-in Errors & Omissions tool and displays the results in a window below your forms. Scroll through this list to review the results.



- Check the **Add to Addendum** box to include this report as part of your addendum. Choose the **Error & Omissions Results** form in the **Jump to Forms** drop-down menu to display and annotate this report.
- Click **Options** to set the threshold values for the E&O checker to use.
- Once you've made changes to your report, click **Run Again** to update your E & O report the E & O rules and check your changes.
- Select the **E&O warnings** option to display the specific warnings grouped by report section. Double-click any warning to quickly display the problem field in the form window.
- Click the **Client instructions** option to display any specific instructions the client may have sent along with the order.

Other Formfilling Tools

In addition to the variety of formfilling tools such as on-the-fly contact management and pop-up calculation forms that you have within each forms, WinTOTAL comes equipped with a number of additional formfilling tools including:

- A Spell Checker
- A Change Case tool
- Calendar
- Math Calculator
- An Area Estimator
- Copyrighting tools
- A File Label tool
- And more…

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For a more detailed list of available tools and their descriptions, see the Tools chapter of this user guide.

Sign Reports

When your report is complete and ready to deliver, it's first time to sign the report. This is an important step in the electronic world, as applying your digital signature also "locks" the report so it can no longer be changed.

Signing Reports

To sign a report:

1. From the Forms PowerView, click **Sign** in the toolbar, or choose **Tools**, **Sign/Unsign** from the menus.

2. Mark either the **Appraiser** or **Supervisor** option.
3. Choose a color. You can have your signature print in blue or red (on a color printer) even if it was scanned in black.
4. Check the box to insert the current date automatically into the **Signed Date** field of your report.
5. At the bottom of the screen, a handful of other options appear and can assist you in completing various tasks with your report. Options are:
   - **Export report comps into Comparables Database** – This option automatically adds the comps and subject information from your current report to your comps database so you can retrieve them easily later. If the comp is already in your database, you may be prompted about whether you want to update the comp with the latest information in your report.
   - **Set report status to complete...** – If you're using WinTOTAL's internal status tools in conjunction with your XSite, you can indicate that the report is complete automatically when you sign a report by marking this option.
   - **Deliver report using XSite Delivery Wizard** – If you are using WinTOTAL in conjunction with your XSite, this feature automatically starts the XSite Delivery Wizard to deliver your report when it's checked. For more information on the XSite Delivery Wizard, see the Report Delivery section of this user guide.
6. Click **OK**.
7. If you configured your system to protect your signature, type the password you assigned, and click **OK**.

Now, all pages of the report have been "signed."

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Unsigning Reports

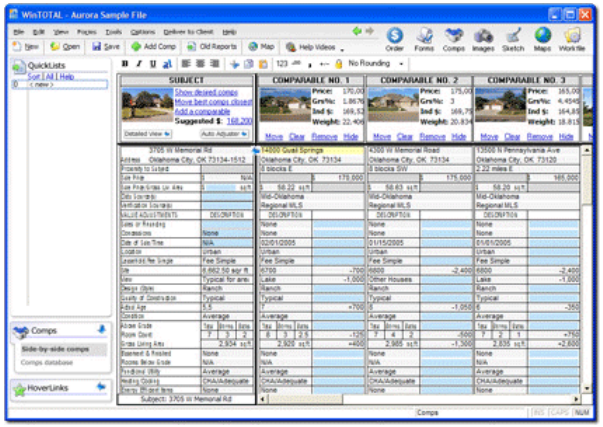
To unsign a report:

- In the Forms PowerView, click **Sign** again and choose to **Remove** your signature(s) instead.

Comps PowerView

The Comps PowerView is designed to turn one of your most valuable assets – your comps – into a powerful business tool. The expanded Comps Database allows you to quickly find and place the best comps for your report, while the side-by-side view allows you to quickly apply standard adjustments across all of them at once. Coupled with the new MLS import tools, these new features can easily save you countless hours, and help you generate more business in the process.

WinTOTAL's side-by-side comps view gives you the flexibility to manage all of your comps at once. Since you're not constrained to form layouts for your comp work, you can easily make adjustments to all of your comps, copy data back and forth from comps, and rearrange comps without the usual copy and paste process that forms require. To get to WinTOTAL's side-by-side comps view, just click **Comps** in the main toolbar.



From this view, you can:

- Define and apply automatic adjustments
- Rearrange your comps
- Add, remove, or import comps
- Reuse comp data from other comp columns
- And more…

Add Comps

WinTOTAL provides several ways to assist you in adding comps into your reports. There are three ways you can add comps into you report.

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- **Manual Data Entry** – In the side-by-side comps view, just click the **Add a Comparable** link at the top of the **Subject** column to insert another comp column.
- **Old Reports –** To import a comp from an old report, click **Old Reports** in the toolbar of the side-by-side comps view. Then, browse to a folder in your File Cabinet, click a report and double-click mark each of the comps you want to import from a previous report. Finally, click **Import** to pull in all the data about the marked comps.
- **The Comps Database –** Your Comps Database is your desktop resource for electronic comp data. When used appropriately, you can virtually eliminate the need for MLS printouts. Just click Comps Database in the **Comps** pane on the left, mark the comps you want to use in your report, and click Place to add them.

Remove Comps

If you need to remove a comp from your report, you can do so in the side-by-side comps view in two different ways depending on your needs.

- **Clearing the Column –** If the comp data in a column does not apply to your current report, just click **Clear** at the top of the comp's column and verify that you want to clear the column. WinTOTAL flushes out all of the data from that column, including the comp photo.
- **Removing the Comp –** If you originally placed the comp in the report with the intention of using it in the current report, but have since decided that the comp won't suit your needs, click **Remove** instead of **Clear**. When you click **Remove**, WinTOTAL prompts you to add the comp to your workfile as a means of complying with USPAP. Just click **Yes** to save the comp to your workfile or click **No** to simply flush it out of your report.

Hint: If you choose to add the removed comp to your workfile, you can find it in your workfile later, click it, and click **Restore** to add it back into your report.

Arrange Comps

Whether you need to add a comp, clear one out, or just rearrange them, WinTOTAL provides all the tools you need to manage your comps from the side-by-side comps view.

Moving Comps

As you continue to work on your report, you may decide that you need to rearrange the order of comps in your report, hide a few comps from view so that you can make that comp flush with the subject, or pull hidden comps back into view. There are several ways you can reorganize your comps:

- **Swapping Comps –** If you need to swap the order of two comps in your report, click the **Move** link in the top of either comp column. Then, choose **Swap With** and select the comp column where you want to move the current comp.
- **Manually Reordering Comps –** If you need to fully reorder your comps, click the **Move** link at the top of any comp column and then choose **Reorder Comps**. In the screen that appears, use the up and down arrows to reorder the comps list to fit your needs. Then, click **OK** to apply your changes.

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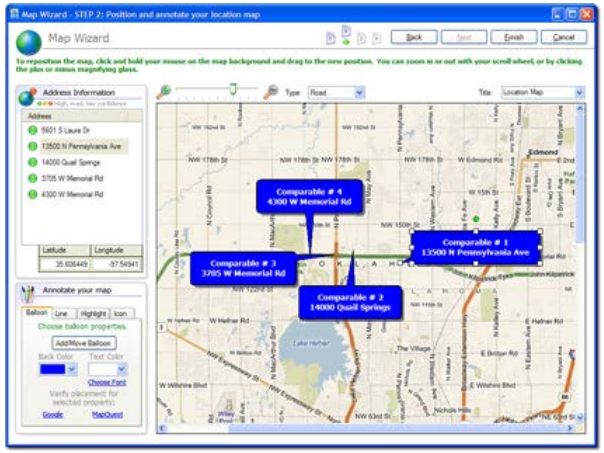
- **Automatically Reordering Comps –** If you need to order your comps by their similarity to the subject property, click **Move Best Comps Closest** at the top of the **Subject** column. WinTOTAL evaluates the adjustments you've made to your comps and reorders them so that those with the smallest adjustment percentage are closest to the subject.
- **Hiding Comps** – If you're comfortable with the order of comps in your report, but you want to hide some of the comps from the side-by-side view so that you can place certain comps flush with each, click Hide at the top of each comp you want to hide from view. The comps disappear from view but remain in your report. This can help you organize your comps so that they're flush with the subject to make adjustments easier but without reordering the comps in your report.
- **Restoring Hidden Comps** – If you've hidden some of your comps from view so that you can align other comps to ease the adjustment process, you may need to restore them to view at some point. To do so, just click **Show Desired Comps** in the **Subject** column and either click **Show All** OR click **Show Specific**, mark the comps you want to see, and click **OK**.

Map Comps

If you want to evaluate your comps based off their proximity to the subject property, you can place the comps in your report onto a location map for reference. To do so…

1. From the side-by-side comps view, click **Map** in the toolbar.
2. In the **Maps Wizard**, confirm the property addresses and click **Next**.



3. Modify your map as desired using the **Annotate** tools in the **Location Map Options** pane.
4. Click **Finish** when you're done referencing the map.
5. Finally, you're prompted to add the reference map to your report's digital workfile for safekeeping. Click **Yes** to add it to your workfile or click **No** to simply close the Map Wizard.

Comps Detailed View

On top of the standard comparable information, you can now store additional data about every comp. This data, such as separate fields for garage and carport, or porch, patio and deck, is included with the comp and can be used to make automatic adjustments. However, the data is aggregated and inserted into the proper field on the form's grid. To use the comps detailed view, click **Detailed View** at top of

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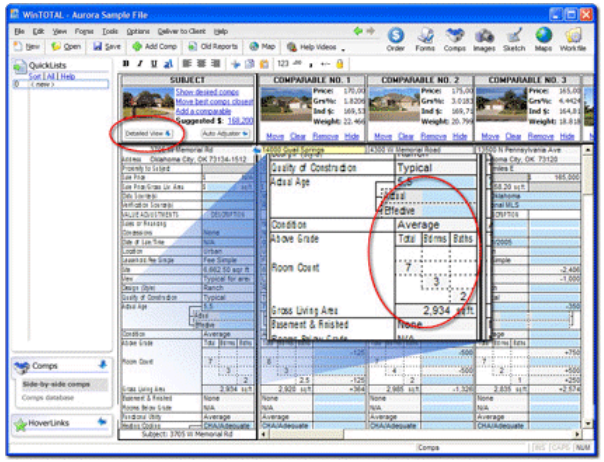
Subject column in the side-by-side comps view to expand the grid in the report and enter additional data.



Fill Out Comp Columns

When you're editing comps in the side-by-side comps view, you may often need to pull data from another comp column into the field where you're currently working. WinTOTAL acknowledges this fact by providing a number of shortcuts you can use to copy data to and from other columns. To use WinTOTAL's comp-specific formfilling tools…

- Press the equals key (**=**) at the beginning of any field to copy information from the corresponding field in any other comp, or the subject. For instance, if your cursor is in the **Location** field, pressing **=0** copies the contents of the **Location** field in the subject to the **Location** field in the current comp. Pressing **=1** copies the contents of the first comp, **=2** the second comp, and so on.
- Press the equals key (**=**) at the beginning of the address field for any comp to copy the data for the entire column from another comp or subject column. For instance, pressing **=0** from the address field copies the entire subject column into the current comp column. This can help you shave formfilling time off of the life of your report when you're dealing with a very similar property.
- Press the equal key twice (**==**) to clear the current field.
- Press **F2** in the description field of any comp to copy the contents of that field forward across all higher numbered comps.
- Clicking the **Suggested** value listed at the top of the subject column inserts a weighted average of your comps into the field for the indicated value based off the sales comparison.

Note: WinTOTAL determines its suggested value for sales comparison based off of a weighted average of your comps.

In addition to these comp-specific formfilling tools, keep in mind that you can use both QuickLists and comp data from your Comps Database to save even more time when filling out the grid.

Automatically Adjust

In the past, WinTOTAL included the ability to make standard adjustments across all comps based on square footage. While the Square Foot Adjuster is still alive and well in the **Tools** menu, the newest version allows you to make adjustments across ALL comps in the report based on just about any field. In addition, you can build sets of assumptions and adjustments, then save and load them at will.

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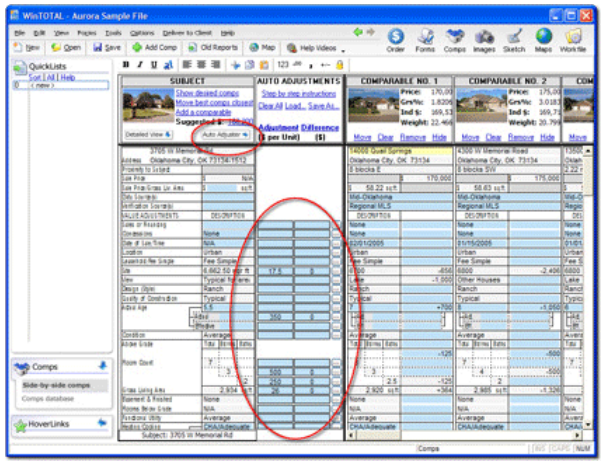
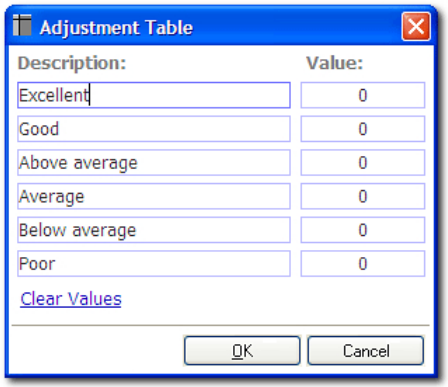
Defining Adjustment Rules

To create a set of automatic adjustments…

1. From the side-by-side comps view, click **Auto Adjuster** at the top of the **Subject** column.



2. In the Auto Adjustment fly-out column, you can define adjustments for either text-based responses OR numeric responses. Depending on whether the column's data is text or numbers, the process differs.
   - **For Numeric Fields –** Enter a per-unit adjustment value into the Adjustment column. For instance, if you wanted to make a flat adjustment of $15 per square foot of difference for the GLA, you'd type "15" (without the quotes) into the **Adjustment** column for that field.
   - **For Text Fields –** Click the button with three dots to the right of the **Difference** column. In the screen that appears, enter each of the descriptions you might use for each comp into the **Description** column. In the **Value** column, enter a dollar value that you'd like to apply to any comp that differs from the subject. For example, if in the **Condition** field you would normally use "Excellent," "Average" or "Poor," enter these values in the left column (leave the additional fields blank). Then, if you would normally make a $1,000 adjustment if the subject was rated excellent and the comp "Average," put "1000" in the **Value** column to the right of "Average." Likewise, if the adjustment for a "Poor" house was $1000, enter "-1000" in the **Value** field to the right of "Poor." Once you've completed the **Adjustment Table**, click **OK** to save it.



3. To apply an adjustment threshold that prevents automatic adjustments below a specified dollar value, use the **Difference** column to enter a minimum dollar value adjustment that WinTOTAL must exceed before applying the adjustment.

WinTOTAL automatically applies your adjustment rules to your report as you leave each field.

Saving Adjustment Rules

Since the same set of adjustment rules do not apply to every report, you should save your adjustment rules so that you

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can retrieve them when you work a report for which they apply. To save your adjustment rules…

1. In the side-by-side comps view, use the auto-adjuster to define your adjustment rules.
2. After creating the adjustments you need (as you might do for a neighborhood, for example), click **Save As** at the top of the **Auto Adjustments** column.
3. Enter a name for this set of assumptions and then choose whether it should be available to only you or to everyone using this copy of WinTOTAL.
4. Click **OK** to save the assumptions.

Loading Adjustment Rules

As you continue working new reports, you will need to load the proper set of saved adjustment rules in order to have WinTOTAL automatically apply the right adjustments to your comps. To load a set of adjustment rules…

1. In the side-by-side comps view, open the auto-adjuster by clicking the auto-adjuster button at the top of the subject column.
2. Click **Load** and choose the desired assumptions set from the list
3. Click **OK** to accept your choice and apply your automatic adjustment rules across all comps in the report.

Hint: Your auto-adjustment assumptions are saved as part of the report. When you clone an old report, or use the SmartMerge feature, the auto-adjustments are brought along.

Comps Database

The Comps Database is your central location for getting the most out of one of your most precious resources. When adequately stocked with an ample supply of comp data, your WinTOTAL Comps Database can virtually replace your MLS as a source of reliable comp information. Moreover, if you add comps from your old reports into your database, you can even place comps in the grid with data in your own shorthand! Regardless of where you acquire your data, the Comps Database is a fast, improved, appraiser-centric replacement solution for your MLS print outs and county records. To access your Comps Database…

1. In WinTOTAL, click **Comps** in the toolbar at the top.
2. Then, click **Comps Database** in the **Comps** pane on the left to open the comps database.

Hint: For a faster way to access your Comps Database, you can create a HoverLink directly to it. This is great for those avid Comps Database users.

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Import Comps

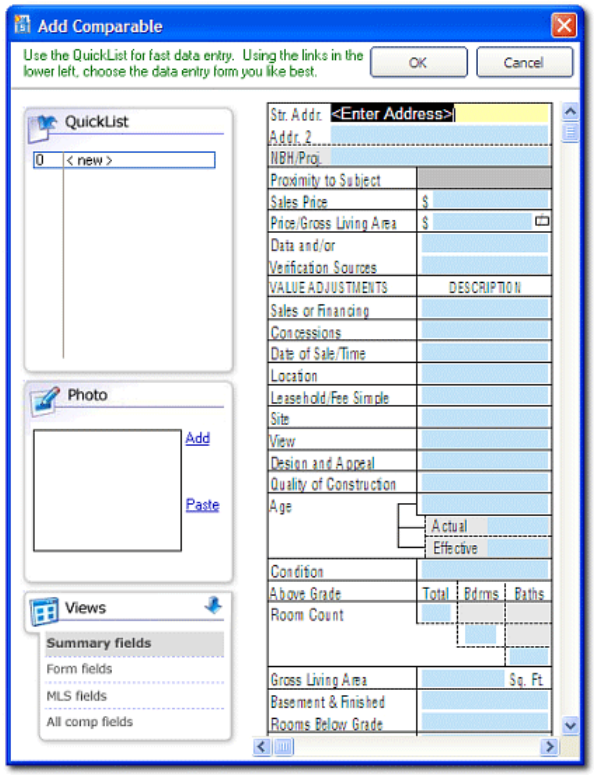
The first step in using your Comps Database effectively is to fill it with reliable comp data. While you may get your comp data from your MLS, county records, other appraisers, old reports, or another public source, the WinTOTAL Comps Database has a way for you to import them. There are four primary ways to import comp data into WinTOTAL's Comps Database:

- Manually type the data
- Import it from your File Cabinet
- Import it from open reports
- Import it from your MLS or another electronic source

Enter Comps Manually

To add a comp to your database manually…

1. In the Comps Database, click **Add** in the toolbar at the top.
2. Click **Manually** to open the **Add Comparable** screen.



3. Enter the required data in the fields, keeping in mind that QuickLists are available to insert common terms.
4. Click **Add** in the **Photo** pane to select a photo to associate with this comp. Select the photo from your hard drive and click **Open**. Alternately, you can copy a photo from another location and paste it into the comp by clicking **Paste**.
   - Click **All comp fields** in the **Views** pane on the left to expand the form to allow more data.
   - Click **Summary fields** to limit data to info in comps grid. Notice that several of the items have additional

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fields in which you can enter specific data that may or may not appear on certain forms. This data can be used to make automatic adjustments, but won't print on the report. See the Comps Detailed View section of this user guide for more information about this feature.

5. When completed, click **OK** and your new comp is added to the database.

Import Comps from Old Reports

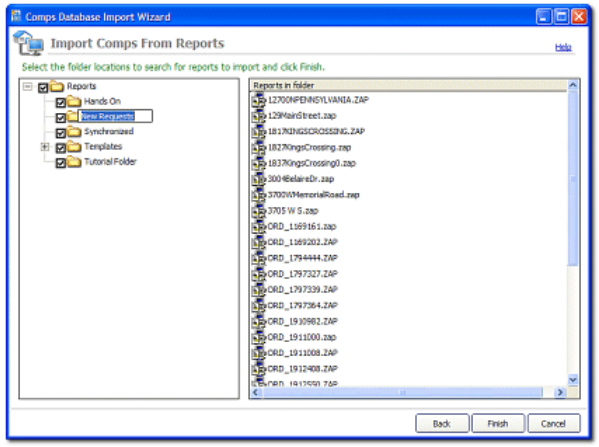
If you've been using WinTOTAL to write up your reports for a while, you've accumulated a wealth of information you can add into your comps database for quick access later. To capture the power of that information in your comps database, you simply need to import it. Before you begin, you may want to collect all of the reports from which you wish to import comp data and place them in a single folder in your Appraisal Desktop File Cabinet. If you have a huge number of files (over 500), you may need to divide them among two or more folders to process them in batches. Once you're ready to begin, to import comps from your old appraisal reports…

1. From the Comps Database, click **Import**.

2. Select the **Import from reports in your File Cabinet** option, and then click **Next**.

3. Choose a cutoff date to insure that you do not pull in comp data older than your cutoff date, and then indicate how you want WinTOTAL to deal with duplicate comps by checking the **Search for duplicate comps** box and marking your choice. When finished, click **Next**.

4. Select the desired folder from list. Individual reports stored in that folder appear in the window to the right for reference.



5. Click **Finish** to begin the import.

Import Comps from Open Reports

To import the comps from your current report in your database…

1. In the Comps Database, click **Add** in the toolbar.

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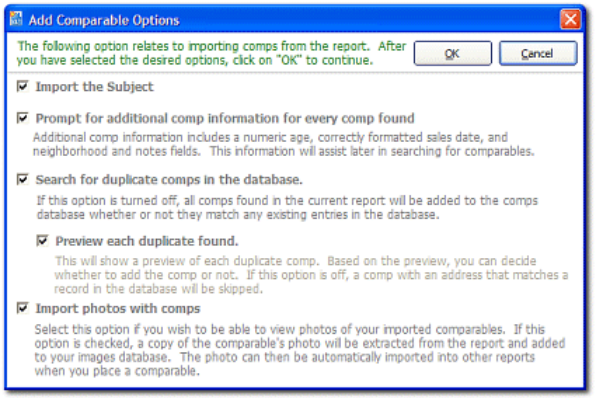
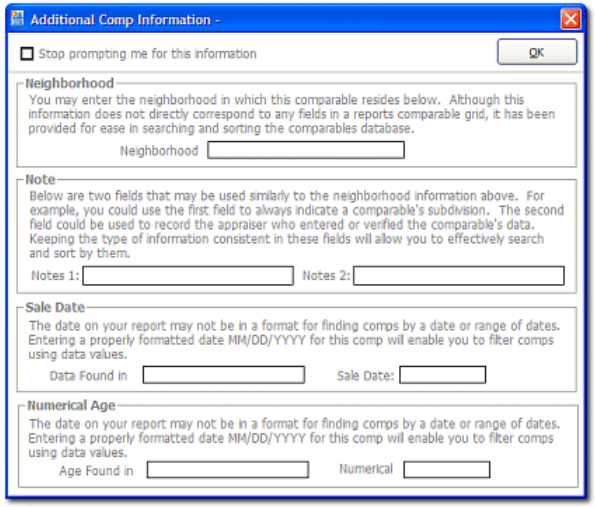
2. Click **WinTOTAL** in the screen that appears.


Add Comparable Options
The following option relates to importing comps from the report. After you have selected the desired options, click on "OK" to continue.
OK
Cancel
Import the Subject
Prompt for additional comp information for every comp found
Additional comp information includes a numeric age, correctly formatted sales date, and neighborhood and notes fields. This information will assist later in searching for comparables.
Search for duplicate comps in the database.
If this option is turned off, all comps found in the current report will be added to the comps database whether or not they match any existing entries in the database.
Preview each duplicate found.
This will show a preview of each duplicate comp. Based on the preview, you can decide whether to add the comp or not. If this option is off, a comp with an address that matches a record in the database will be skipped.
Import photos with comps
Select this option if you wish to be able to view photos of your imported comparables. If this option is checked, a copy of the comparable's photo will be extracted from the report and added to your images database. The photo can then be automatically imported into other reports when you place a comparable.

3. To import the subject property, check the **Import the Subject** box.
4. Select **Prompt for additional comp information** if you prefer to add additional data to each comp during the import process.
5. Check the **Search for Duplicates** box to automatically search your database for duplicate comps before importing them. If desired, check the **Preview each duplicate found** box to force WinTOTAL to prompt you whenever it finds a duplicate. You're then given the option of adding duplicate comps anyway. If this option is not selected, any comps with duplicate addresses are ignored.
6. Finally, check the final box if you'd like to have any photos associated with a comp imported as well.
7. Click **OK** to begin the import process.
8. If you selected the **Prompt for additional information** option, a screen appears for each comp allowing you to enter items like the neighborhood name, notes, sale date or age. Enter the desired data and click **OK**. Repeat for each comp, or click **Stop prompting me for this information** to discontinue the prompts.


Additional Comp Information -
Stop prompting me for this information
OK
Neighborhood
You may enter the neighborhood in which this comparable resides below. Although this information does not directly correspond to any fields in a reports comparable grid, it has been provided for ease in searching and sorting the comparables database.
Neighborhood
Note
Below are two fields that may be used similarly to the neighborhood information above. For example, you could use the first field to always indicate a comparable's subdivision. The second field could be used to record the appraiser who entered or verified the comparable's data. Keeping the type of information consistent in these fields will allow you to effectively search and sort by them.
Notes 1:
Notes 2:
Sale Date
The date on your report may not be in a format for finding comps by a date or range of dates. Entering a properly formatted date MM/DD/YYYY for this comp will enable you to filter comps using data values.
Data Found in
Sale Date:
Numerical Age
The date on your report may not be in a format for finding comps by a date or range of dates. Entering a properly formatted date MM/DD/YYYY for this comp will enable you to filter comps using data values.
Age Found in
Numerical

Import Comps from Data Sources

A great way to get comp data into your database is by importing it from a source such as your MLS. Most modern systems have a service that provides you with sales data in a common database-compatible format. WinTOTAL supports the following data types:

- Microsoft Access 97 or 2000 (.MDB)
- Comma delimited (.CSV)
- Text file (.TXT)
- Xtensible Markup Language (.XML)
- Pipe delimited
- Tab delimited

Using WinTOTAL's MLS import tool is a two-step process:

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1. Define an import template for your MLS and import the first time
2. Re-use the import template for future MLS export files

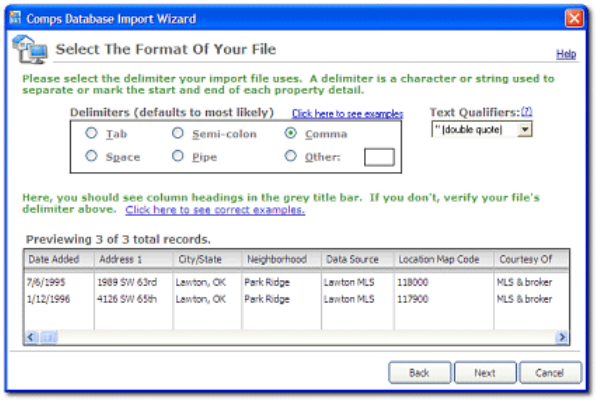
If you use NDCData.com, Click Here for special import instructions.

Hint:
For best results, download new comp data from your MLS on a regular basis. By regularly importing the new data into your Comps Database, you can ensure that the existing data in your Comps Database is both extensive and as up-to-date as the data in your MLS.

Define MLS Import Templates

The first time you import data from an electronic data source like your MLS, you must tell WinTOTAL how to accurately import the information. Once you've done so, WinTOTAL automatically imports the data from your first file. Then, for future files that you've downloaded from your MLS or other electronic data source, you can simply re-use the template you've already created. To define your MLS import template:

1. Obtain the comp data file from your MLS provider and save it on your hard drive.
2. In the Comps Database, click **Import** in the toolbar.
3. Select **Import property data from external source** and click **Next**.
4. Click **Browse**, find and select the import file from your hard drive, then click **Open**.
5. Type a description for your template so that you can quickly refer back to this template when you import additional data from the same source in the future.
6. Select either the **Residential** or **Commercial** option to reflect the type of property you're importing.
7. If necessary, check the **Search for Duplicates** box and tell it how to handle any it finds. Options are:
   - Don't Add Duplicates
   - Update the Existing Comp
   - Preview each duplicate found and let me decide what to do
8. Click **Next** to continue.
9. Since WinTOTAL automatically guesses the correct delimiter, it should already be selected for you. If WinTOTAL is unable to guess the correct delimiter, choose a different delimiter from the selection box. You can also select a **Text Qualifier** if your data source uses a particular character (most often a quote "") to designate text fields.
10. Ensure that the data looks correct in the sample window and click **Next** to continue.



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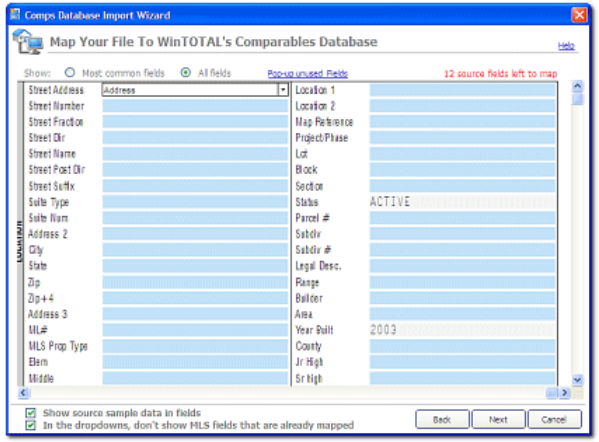
11. Now you need to choose the data fields that you want to import from the source file, and tell WinTOTAL into which WinTOTAL fields you want to insert each MLS field. WinTOTAL always makes an educated guess about what data belongs in which fields. When it knows, it automatically maps those fields for you. In the event that WinTOTAL is unsure about where to place the data from your MLS, it makes those data fields available in a drop-down list so that you can choose which WinTOTAL field maps to your MLS field.

Note: You can select as many fields as necessary and you can insert the same field more than once. This is useful if your data source has information in one field that you would like to divide up and place in multiple fields.

12.



13. To map the remaining fields, click **Pop-up unused fields** at the top and review the list of fields you still need to map.

14. Find a field in the sample form that WinTOTAL provides to map any of the remaining fields from your MLS file.

15. When you've found a field on the WinTOTAL sample form that correlates with a field from your MLS file, just click it and choose the appropriate field from the drop-down menu.

16. Repeat this process until you've mapped all the remaining fields from your MLS file and then click **Next**.

17. The spreadsheet-like tool that appears next is useful for manipulating data from your source file before it is imported into your Comps Database. For example, you might need to consolidate data from several fields into one item. Or, you could find a "code" in a source field that indicates a feature of the property. You can use the power of the spreadsheet's text handling formulas to find this information and put it into a format that is more useful to you in your appraisal practice.

18. Enter the desired formula in the cells and click **Finish**.

19. If you chose to preview duplicates, use **Add New**, **Update Existing** or **Skip options**.

20. When the **Import Complete** message appears, click **Close** to complete the process.

Use MLS Import Templates

After you've defined an MLS import template for your local MLS, you can use the same template to quickly import data from download files you generate from your MLS later. The next time, you need to import data from the same source, copy the new data file to your hard drive, then:

1. From the Comps Database screen, click **Import**.

2. Mark the **Use a previously defined template** option and click **Next**.

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3. From the drop-down menu, select the import template you wish to use.
4. If necessary, select **Edit this template** and click **Next** to repeat the above steps.
5. Otherwise, mark **Proceed to Finish Page** (import now) and click **Next**.
6. If any errors occur during the import process, an error log appears, allowing you to correct the error and re-import the data or enter it manually.

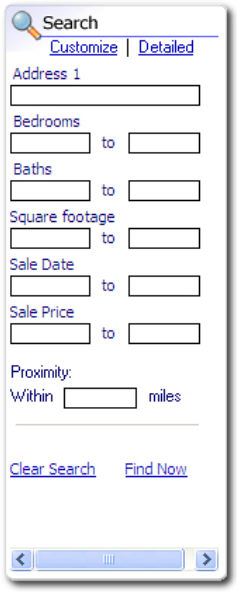
Search for Comps

Of course, the real power of any database is the ability to search for information quickly. The Comps Database has several search options.

Quick Searches

The **Search** pane on the left contains several common search fields.

1. From the Comps Database, enter search criteria in any or all of the fields listed in the **Search** pane on the left. Use complete information or partial text. For example, in the address field, either enter the full address, or just the street name.



2. In the **Proximity Within** field, enter the distance — in miles — from the subject property within which you want to limit the search. Enter whole numbers or decimals

> **Note**: For the proximity searches to function properly, WinTOTAL must pinpoint each property through "geocoding" the addresses. This process can be scheduled to run on a regular basis, ensuring that your database is ready for any search. See Geocode Comps in the Configure WinTOTAL chapter of this user guide for more information about setting up this feature.

3. Click **Find Now** to display comps that match your criteria.
4. Click **Clear Search** to reset your list to show all comps.

Custom Quick Searches

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Of course, you're not limited to searching in the fields included by default. You can choose also choose your favorite fields from a provided list and add them into the **Search** pane on the left. To do so…

1. From the Comps Database, double-click the desired field in the list on the left to add it to your **Search** pane. Similarly, double-click any item in the right column to remove it.
2. Use the **Up** and **Down** buttons to reorganize the items in the list.
3. Click **OK** to accept your changes.

Advanced Searches

Instead of customizing the quick search fields, you can always perform a detailed search. To do so…

1. In the Comps Database, click **Detailed** at the top of the **Search** pane.
2. Once again, you can customize which fields appear in the **Detailed Search** window by clicking the **Customize** button. Use the steps above to add the desired fields.
3. Enter your search criteria and click **Search**. The results of your search are displayed in the **Comps Database** window.

Note: You may need to re-arrange the windows on your screen to view the Comps Database window. If you have limited screen area, click the **Close after search** option in the **Detailed Search** window.

4. Continue to modify your criteria and click **Search** each time to narrow your search even further.
5. When the desired results are displayed, click **Close** to return to the Comps Database display.
6. Click **Clear Search** at the bottom of the **Search** pane to reset search options and display all of your comps.

Map Comps

It's often easier to spot valid comps when you see them laid out on a map. The Comps Database can quickly generate a map showing the location of any selection of comps. To do so…

1. In the Comps Database, select comps you'd like to map by checking the box to the left of each property.

Hint: Use the Comps Database's search features to display a limited number of comps that meet your criteria. Then, right-click any comp and choose **Mark Comps**, **Mark All** from the pop-up menu.

2. Click **Map** in the toolbar at the top, or right-click anywhere in the Comps display and select **Map**, **Selected comparables** from the pop-up menu.
3. In the **Maps Wizard**, confirm the property addresses and click **Next**.

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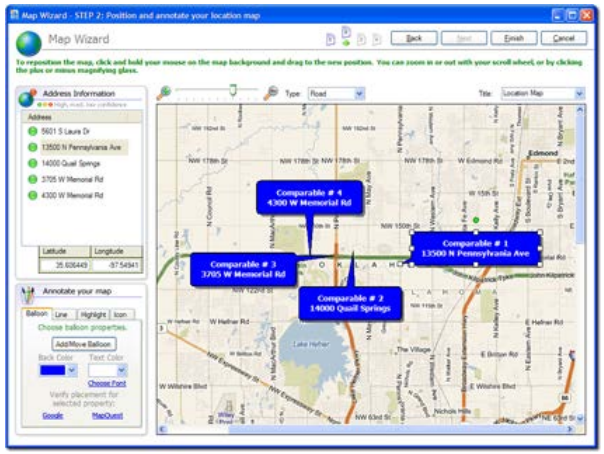


4. Modify your map as desired using the annotation tools in the **Annotate your map** pane.
5. Click **Finish** when you're done.
6. Next, you're prompted to add the map to your digital workfile for this report to better maintain compliance with USPAP. Just click **Yes** or **No** to indicate your choice.

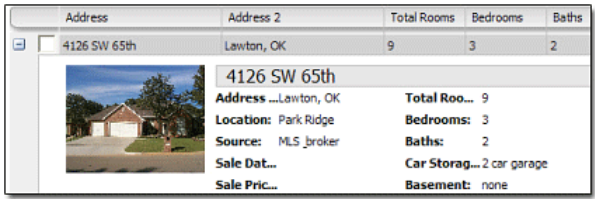
Another option is to use a map to find all comp within a certain radius of the subject. To do so…

1. In the Comps Database, right-click any comp in the list. From the pop-up menu, choose **Map**, then 1, 2, 5 or 10 miles. To enter a different distance, click **Custom**, type the amount and click **OK**.
2. In the **Maps Wizard**, confirm the property addresses and click **Next**.
3. Modify your map as desired using the annotation tools in the **Annotate your map** pane.
4. Click **Finish** when you're done.

View Database Comps

When you first enter the Comps Database, you're presented with a list of comps with limited information in columns. However, there's a wealth of information just under the surface.

- Quickly sort the comps list by clicking header name
- Click the plus sign (**+**) for any comp to view the details for that property. Note the new MLS-oriented view of the information.



- To select which fields are shown in the detail view:
  1. Right-click any comp and choose **Edit**, **Property Detail Fields**.
  2. From the list of available fields on the left, double-click the ones you want to include. Similarly, double-click any item in the right column to remove it from the detailed view.
  3. Use the **Up** and **Down** buttons to reorganize the items in the list.
  4. Click **OK** to accept your changes.
- To edit which columns appear, right-click any heading and select **Edit**, **Column Layout**. Use the steps 1-4 above to add or delete columns.

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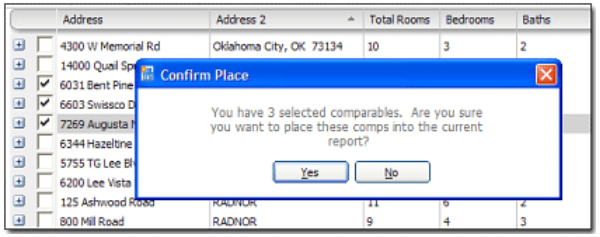
Insert Database Comps

Once you've found the comps that you want to use in your report, it's easy to place them in your report. To do so:

1. In the Comps Database, check the boxes next to the desired comps.

> **Hint**: Use the Comps Database's search features to display a limited number of comps that meet your criteria. Then, right-click any comp and choose **Mark Comps**, **Mark All** from the pop-up menu.

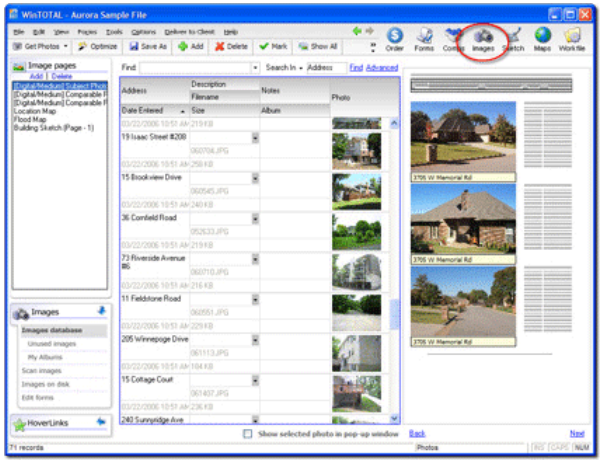
2. Click **Place** in the toolbar at the top.



3. When you're prompted to confirm your comp placement, just click **Yes** to place your comps in the grid.

Images PowerView

The photo capabilities of WinTOTAL are accessed by opening a report, then clicking **Images** from the toolbar at the top. In each of the different views, thumbnail images are displayed. You can view a larger image by simply hovering your mouse pointer over any thumbnail. The image then expands and remains there until you move your mouse away from that photo. To access the Images PowerView, just click the **Images** button to the upper left of WinTOTAL.

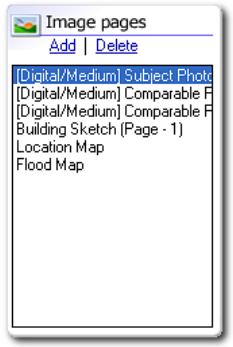


Work with Image Pages

The **Image pages** list on the left side of the **Images** PowerView shows all of the photo pages currently in your document.

To add additional photos pages…

1. In the Images PowerView, click **Add** at the top of the **Image pages** pane to bring up the **Contents** page.
2. The list on the left shows the available photo pages in WinTOTAL. From this list, double-click a form you wish to add to your report.
3. The list on the right displays the forms you've added to your report. Click



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and drag the new form to the desired position in the report.

4. Continue to add photo forms and click **OK** when you're done.

Note: If you choose to add one of the **Comparable Photos** pages, you should be prompted to indicate which comp or comps the page should be linked with. Enter the desired comp number and click **OK**. Any relevant information is automatically copied from the comp(s) to the photo page.

Some additional options are available in the **Image pages** pane as well:

- To delete an unwanted photo page, select it and click **Delete**.
- To view any of the photo pages, simply click it.

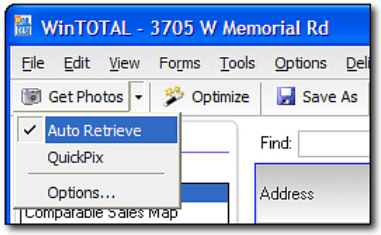
Download Photos

If your camera is configured to work with your Windows operating system, Windows should prompt you about how you'd like to handle the images on your removable device or camera. To simplify this process, we've added an option to this list so that you can choose to run the WinTOTAL photo retrieval process whenever you connect the device to your computer or place it in its docking station. You have two options for retrieving photos:

- The new **Auto-Retrieval Wizard** which can import your photos based on the same criteria each time and can eliminate some of the data entry that QuickPix requires from your workflow.
- The same QuickPix application found in previous versions of WinTOTAL.

To tell WinTOTAL which method you prefer to use…

1. From the Images PowerView, click the **small arrow** to the right of **Get Photos** in the toolbar at the top.



2. From the pop-up menu, choose **Options**.
3. Mark the option for the photo retrieval method you'd like the system to use as a default and click **OK**.

Note: You can always override the default setting by choosing either retrieval method from the pop-up menu accessed by clicking the **small arrow** to the right of **Get Photos** in the toolbar.

Auto Retrieval Wizard

The first time you run the Auto-Retrieval Wizard, you need to set the options you'd like it to use each time it is run. Once you've configured WinTOTAL to import photos from your digital camera or card reader, you can forego the setup and skip straight to importing the photos.

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First Time Setup

1. Connect your camera to your system, or insert your storage device into a card reader.
2. In the Images PowerView, click **Get Photos** in the toolbar at the top of the screen.
3. If asked to use previous settings, click **No** to set up the import process. Once you've configured it, you can click **Yes** to automatically perform the import in the future.
4. The **Auto-Retrieval Wizard** appears to walk you through the configuration process. Click **Next** to begin.
5. The first step is to configure your camera.
   - Select the **Photo Source** from the drop-down menu if you use an older camera. Otherwise choose **Disk/Directory/PC Card**.
   - Mark the **Retain image quality** option if you prefer to have your photos imported without any additional compression.
   - In the **Path to Photos** field, type the directory name where your photos are stored. If you're using a storage device like a Compact Flash or SD card reader, just enter the drive letter Windows has assigned to that device. If necessary, click **Browse** to find your directory.
   - The final option forces WinTOTAL to prompt you about deleting the images from the directory or storage device after they are imported. This is useful if you wish to keep your memory card clean for your next batch of photos.
6. Click **Next** to continue.

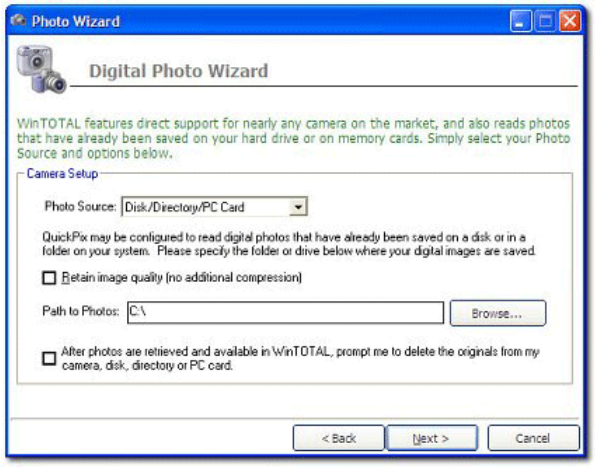
Photo Wizard
Digital Photo Wizard
WinTOTAL features direct support for nearly any camera on the market, and also reads photos that have already been saved on your hard drive or on memory cards. Simply select your Photo Source and options below.
Camera Setup
Photo Source:
Disk/Directory/PC Card
QuickPix may be configured to read digital photos that have already been saved on a disk or in a folder on your system. Please specify the folder or drive below where your digital images are saved.
Retain image quality (no additional compression)
Path to Photos:
C:\
Browse...
After photos are retrieved and available in WinTOTAL, prompt me to delete the originals from my camera, disk, directory or PC card.
< Back
Next >
Cancel

7. This step allows you to designate the information you want to place in the **Notes** field for each image after it is imported. This can be very useful in finding images using the image database's search features. Options are:
   - The **Notes** field allows you to enter any other data that is not likely to change each time you import images. For example, you might wish to include your initials or office ID.
   - The **Append dates to Notes** option puts the date that the images were imported into the database in the notes field.
   - The **Append photo number to Notes** adds a sequential number to each image and adds that to the notes field.
8. Click **Next** to continue.
9. Automatic filenames are generated for each image as it's imported. These can replace the often cryptic file names that most cameras apply to photos. The name is made up of any of these optional items:

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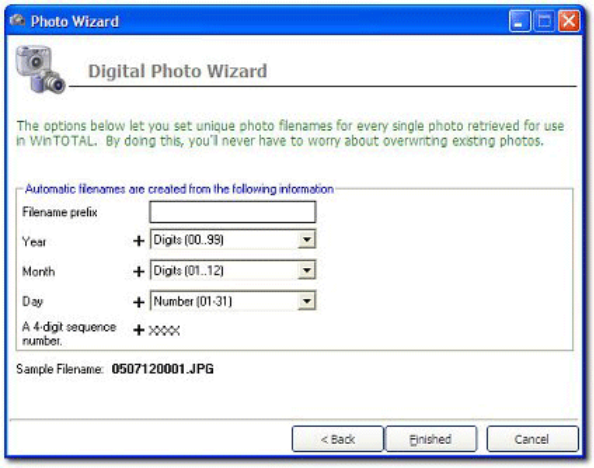
- Any text filename prefix you'd like to assign. Once again, this might be the appraiser's initials or some other individual designator.
- A two-digit Year, a numeric or text Month, and the Day. These items are taken from the date that the images are imported.
- As you make your selections, note the **Sample Filename** at the bottom of the screen.



10. Click **Finished** when you're done.
11. You're prompted to enter a name for a new album containing these photos. The default album name is set to the current date, and a "Set" number. Edit this album name and choose **OK**. Or, choose **Skip** if you do not wish to use albums. If you prefer not to ever use albums, check the **I do not wish to use Albums** box as well.

Note: See the My Albums section of this user guide to learn more about albums.

12. If you marked the option about deleting the original files, answer **Yes** or **No** in the screen that appears to indicate your choice and complete the import process.

Once you've imported your photos and they appear in your Images Database, you can simply place them in your report as usual and WinTOTAL automatically assigns the property information to your photo for you. If you have photos remaining that do not apply your current appraisal and you need to assign property information to them, type it directly into the available fields in the database.

Future Photo Imports

1. In the Images PowerView, click **Get Photos** in the toolbar at the top of the **Images** PowerView.
2. Click **Yes** to reuse your previous settings and begin the import immediately. Or, click **No** to change your import options.

QuickPix

If you're more comfortable using the QuickPix application found in previous versions of WinTOTAL it's still available in Aurora. While this utility can often require you to enter more property information about your photos than the Auto-Retrieval Wizard requires, an advantage outside of familiarity is that you can always run this tool entirely outside of WinTOTAL. As with the Auto-Retrieval Wizard, the first time you run QuickPix, you must configure it to work with your digital camera or card reader. From then on, WinTOTAL remembers your configuration so you can skip to the import process. To start QuickPix…

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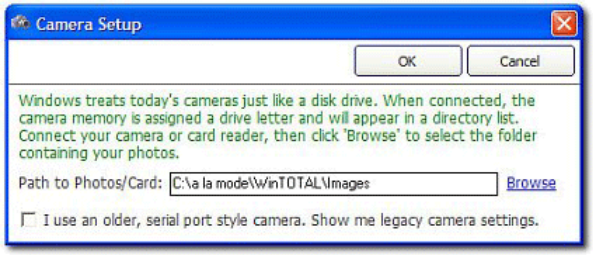
- In the Images PowerView, click the **small arrow** to the right of **Get Photos** in the toolbar at the top of the **Images** PowerView and choose **QuickPix**. Or, if you've configured your default retrieval options to always use QuickPix, just click **Get Photos** in the toolbar.

  - OR -

- Click the Windows **Start** menu, and then choose **All Programs**, **WinTOTAL**, **QuickPix**.

QuickPix Configuration

1. With QuickPix open, click **Camera/Card/Disk, Setup** from the menus.


Camera Setup
OK
Cancel
Windows treats today's cameras just like a disk drive. When connected, the camera memory is assigned a drive letter and will appear in a directory list. Connect your camera or card reader, then click 'Browse' to select the folder containing your photos.
Path to Photos/Card:
C:\a la mode\WinTOTAL\Images
Browse
I use an older, serial port style camera. Show me legacy camera settings.

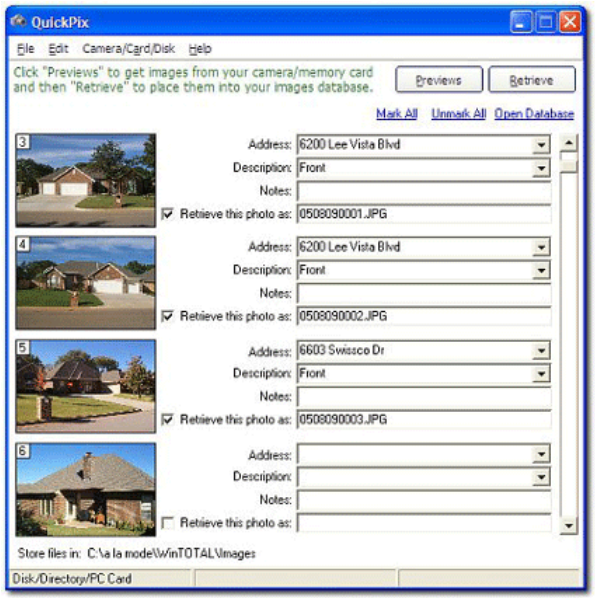
2. Type the path to your photos on your camera or disk or use the **Browse** link to browse out to them. Alternately, if you have an older camera that does not comply with most common Windows integration methods, you can check the box indicating that and search the drop-down list for your camera.
3. Once you have either indicated the camera type or path to your photos, just click **OK**.

You should now be able to load your photos into QuickPix.

Use QuickPix

One of the advantages of this utility is the ability to preview the photos on your camera or storage device before you load them into your database. The process of downloading images from your digital camera into your **Images Database** is summarized as follows:

1. Load previews of your photos into QuickPix.
2. Mark the photos you wish to import.
3. Label the previews with address, descriptions and other notes.
4. Download the selected images into your database.



QuickPix allows you to first see previews or "thumbnails" of the images in the camera before taking the time to acquire

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the whole picture. It automatically assigns a filename to the pictures it downloads and inserts them into the WinTOTAL Images Database. Here's how to do it.

1. From QuickPix, click **Previews**.
2. Once the previews are loaded, use the scroll bar on the right to move through the photos. Mark the check box to the right of those images you wish to retrieve or click **Mark All** to quickly select all of the photos you've loaded.
3. For each photo you mark, complete the **Address**, **Description** and **Notes** fields, as desired. If you loaded QuickPix from within the **Images** PowerView, and have a report loaded in WinTOTAL, you can select the address of the subject property and any comps from the drop-down menu. Likewise, the **Description** field drop-down menu is populated with your common photo descriptions like Front, Rear and Street. (For instructions on adding additional photo descriptions, see the Create Photo Labels section of this user guide.
4. Once the desired images have been marked, click **Retrieve** in the toolbar to import your photos.
5. If you've decided to use the albums feature in Aurora, you're prompted to give this photo set a name. Type a name in available box and click **OK**. Or, if you don't want to place these in an album, click **Skip** and check the box to stop using albums in the future.

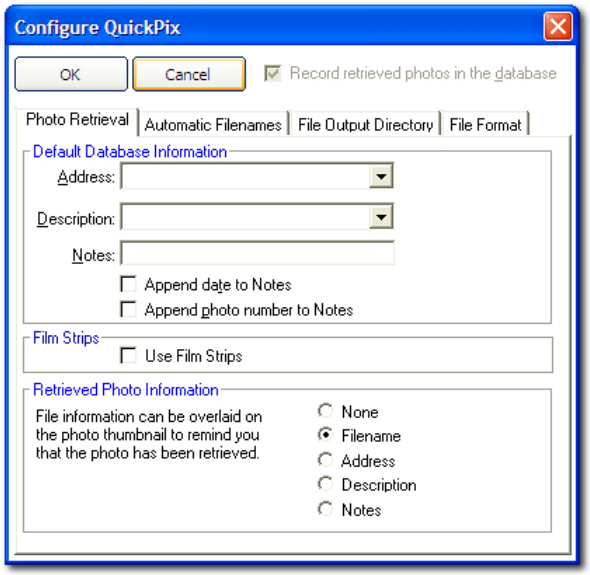
Note: See the My Albums section of this user guide to learn more about albums.

6. After the photos are downloaded, you return to QuickPix. If necessary, you can retrieve additional photos from this set of previews, creating separate albums for separate photo sets. For reference, the file names of those photos you've already retrieved appear in the upper-left corner of the preview image.
7. When you are through downloading images, exit QuickPix by selecting **Exit** from the **File** menu.

Customize QuickPix

There are several options you can configure in QuickPix.

1. In QuickPix, click **File, Configure QuickPix** from the menus at the top to start the configuration process. You are presented with four tabs representing the different areas of the program which you may configure.



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- **Photo Retrieval** - When importing images into the database through QuickPix, you first must display and label the previews as described above. To automate the task of labeling photos, you can set defaults for the database entries. For example, if all of the images you are going to download are for the same address, you can enter a default **Address** before displaying the previews - then perhaps change the default **Address** back before downloading other images. Likewise, you can choose a default **Description** or enter text into the **Notes** field (such as the appraisers' initials).

  - Below these defaults is the option to use albums. Check the box to turn on this feature and have QuickPix prompt you for an **Album name** whenever you import images.
  - Finally, you can customize what information is displayed for images that have already been downloaded during the current QuickPix session. Mark an option to select it.

- **Automatic Filenames -** Digital images are simply data files stored on your computer. When QuickPix imports them from your digital camera, it assigns them a name and stores them in the default image directory (normally, that is C:\A LA MODE\WINTOTAL\IMAGES). As a default, QuickPix assigns the images a file name based on the date of the download and the picture number. However, you can customize this aspect of QuickPix to meet your needs. QuickPix automatically assigns a file extension based on the format of the image.

- **File Output Directory** - Depending on your circumstances, you may need to change the directory in which QuickPix saves its images. We strongly discourage doing this since it could cause an inexperienced user difficulty in tracking images. But, if you're fairly comfortable with your system and desire a different location for images, you can certainly do so.

- **File Format** - Depending on your circumstances, you may need to change the format in which QuickPix saves its images. You can choose one of several formats in this screen. As you click each particular type of file, a brief description appears at the bottom of the screen.

- For the JPEG format, you also have the option to change the compression level that QuickPix uses to make your image files smaller. Move the slider to the left to reduce file size. Of course, this also reduces the quality of the photo. But given the high detail most modern digital cameras produce, you can often move this down to the 40% range without compromising quality.

Hint: JPEG is by far the most common file format for images. Unless you have a compelling reason to select one of the other formats, it is strongly recommended that you stick with JPEG.

2. Once you've configured QuickPix, click **OK** to save your changes. You can exit QuickPix by selecting **Exit** from the **File** menu.

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Images Database

The Images Database allows you to quickly find images that you've imported from your camera, scanner, or card reader and use them in WinTOTAL. This can be great when you need to find additional photos for later reports as you can search for the photo by its address instead of visually scouring your old images to find the one that looks correct. As with many other sections of WinTOTAL, the Images Database contains a variety of views to help you reorganize your images in more intelligible ways. There are three primary views in the Images Database:

- **Images Database** – This option shows you all of the images in your database, regardless of whether they've been used or not.
- **Unused Images** – Shows you images that you've added to your database at some point, but have not yet used in a report
- **My Albums** – Shows a list of images, grouped by the time you imported them from your digital camera or storage device.

To access an alternate view, simply click **Images Database** in the **Images** pane on the left.

Search for Images

You can often shorten the time it takes to find a photo you wish to use in your report by searching or sorting the images in your database.

Searching for Images

To search for an image in your Images Database…

1. In the Images Database, type an address, street name or other information in the **Find** field. If you're not sure of the complete address or street name, just type a portion of the name. For example, just entering "elm" finds anything on Elm Street, Elm Avenue, Elmhurst Blvd or Shady Elms Court.
2. From the **Search In** menu, select the field you would like to search.
3. Click **Find** to begin the search and display the results in the window.
4. To reset the database view to show all photos, click **Show All** in the toolbar at the top.

If you'd like to narrow your search criteria even further, click the **Advanced** link. The **Advanced Photo Search** screen appears, offering additional search fields. Enter as many search criteria as needed to pinpoint your property. You can use any combination of the fields.

As with the "quick find" method described above, if you type partial information in the **Address**, **Description**, **Filename** or **Notes** fields, the program finds any photos that contain that information in their fields. If you'd like to limit your search to exact matches, check the **Exact match** box at the end of each field. Click **OK** to view the results of your search.

Sorting Images

To sort the images in your Images Database…

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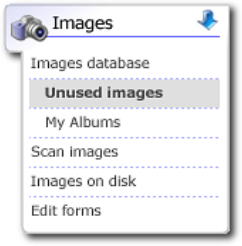
- Just click the column header, like **Address**, to sort by a given column.
- Click it again to sort your images in reverse order.

Unused Database Images



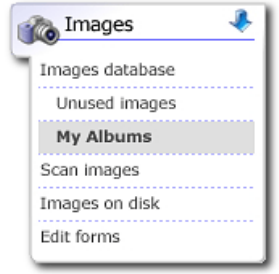
WinTOTAL provides a simple way for you to find and manage the photos you've previously imported into your Images Database, but have not yet used in a report. To access the Unused Images view to help you manage these images, click **Unused Images** in the **Images** pane on the left side of the Images PowerView. This view allows you to quickly sort through your photos when handling new properties. You can also locate and delete photos that you have no intention of using in the future.

On this page you have the option of viewing thumbnails of your photos, or a text list. Check the **View previews** box at the bottom of the screen to toggle between these two options.

Note: If you have the pop-up window enabled, your photos are displayed in that window, regardless of whether you're viewing the thumbnails or the text list.

My Albums

Photo albums are a great way to group images together as you import them. Whenever you import photos into your image database, you have the option of placing them into a new photo album. This can be very convenient if you have multiple appraisers taking photos of different homes, and an assistant importing them into your company's image database. As you import the photos, simply place them in an album that includes the date the photos were taken and the name of the appraiser that took them. When that appraiser sits down to start building reports, he can quickly find the album containing his photos. For information on creating albums, see the Download Photos section of this user guide. To view the contents of an album:



1. In the Images PowerView, click **My Albums** in the **Images** pane on the left.
2. Locate the desired album in the list and double-click its name, or select it and click **Show Images in current album** at the top of the window. The photos in that album are displayed.
3. Click **Show all Albums** to re-display the list of albums.

If you have a large number of albums, you can use the search feature to find a specific album. See the Search for Images section of this user guide for information about using the search features.

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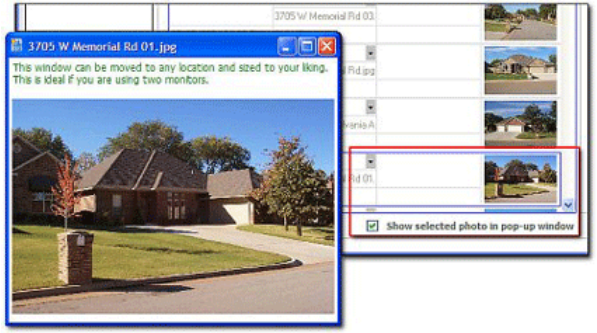
Hint: If you find that albums are a great way to sort your photos, you can make sure that an album is always created when you import photos. Just check the **Always use albums when retrieving images** box at the top of the **My Albums** page.

Photo Pop-up Window

The Images PowerView gives you several ways to view both the images in your database and those stored on your computer. In each view listed in the **Images** pane on the left, the images are displayed as thumbnails. Using thumbnails instead of the actual photos greatly speeds up WinTOTAL. However, thumbnails may be a bit hard to view, depending upon your screen resolution. To give you a better view of your images, each of the image views has an option to **Show selected photo in pop-up window**. Check the box to enable this feature and a separate window appears containing whichever image is currently selected. Each time you click a different image, the window displays the new photo.

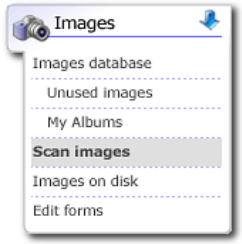

3705 W Memorial Rd 01.jpg
This window can be moved to any location and sized to your liking.
This is ideal if you are using two monitors.
Show selected photo in pop-up window

- Click and drag any edge or corner of the window to resize it. The image resizes automatically to fill the new box.
- Click the title bar of the window to drag it anywhere on your screen. If you're working with dual monitors, you can tuck it out of the way on your second display.
- As you change views by clicking any of the items in the **Images** pane on the left, the pop-up window remains in place.
- If you click a view that does not support the pop-up viewer – or you leave the **Images** PowerView – the window closes automatically.

- To close the window, click **Close** in the upper right of the window, or un-check the option on your image view screen.

Scan Images

WinTOTAL provides a simple way for you to scan images into your report. Images can be photos, maps or any other paper-based documents. To scan an image…



1. From the Images PowerView, click **Scan Images** in the **Images** pane.
2. Click **Source** at the top of the screen to select the scanner device you wish to use. A list of scanner devices configured for your system appears. Select your scanner from this list and click **Select.**
3. Click **Acquire Image** to scan a picture or **Acquire Document** to scan a document. Depending upon how your system is configured, your scanner software should launch and lead you through the steps to bring in your image.

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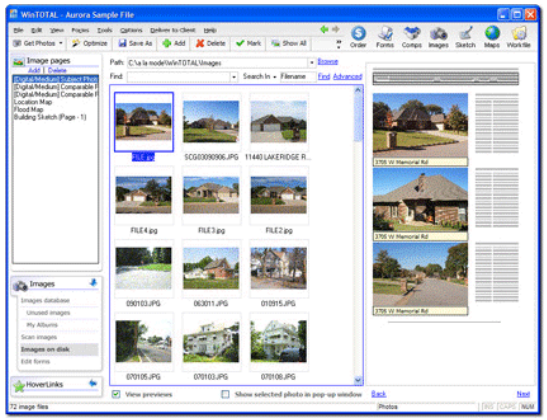
4. When the scanning process is complete, the image appears in the available box at the bottom of this view. From here, you can add a new image page and drag the scanned image to the page. See the Work with Image Pages section of this user guide for instructions on adding an appropriate page to hold your scanned image.

Images on Disk

If you have images on your hard drive or another disc that you need to insert into your report, you can easily browse out to those photos in WinTOTAL and add them into your report. To view the photos on your hard disk or other media…

1. From the Images PowerView, click **Images on disk** in the **Images** pane on the left.
2. Type the directory name into the **Path** field at the top of the screen, or click **Browse** to select a directory from a local or networked drive or select an attached storage device. The photos in that directory or device are automatically displayed in the window.



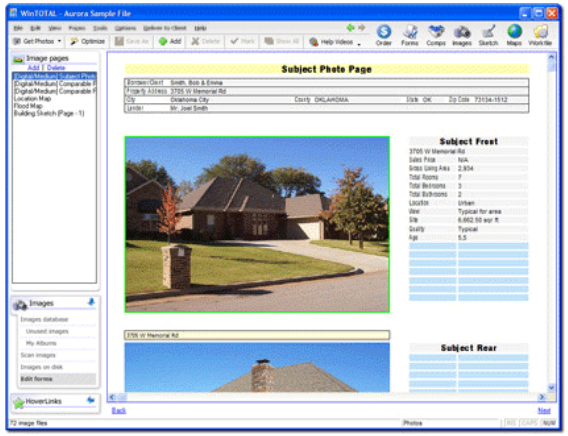
3. Check the **View Previews** box at the bottom of the screen to toggle between viewing thumbnails of your photos and a simple list view. In the list view, click the heading of each column to sort your photos based on that column.

If you have a large number of photos, you can use the search feature to find a specific image. See the Search for Images section of this user guide for more information about finding your images.

Edit Image Forms

As you're working in the Images PowerView, you may need to directly edit your photo forms. While some of your photo information is automatically transferred from your report into the appropriate fields you can edit the information or type additional data in the comments fields through the **Edit Forms** view in the Images PowerView. To edit an image page…

1. From the Images PowerView, click **Edit Forms** in the **Images** pane.



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2. Now, select the desired form from the **Image pages** pane at the top of the page. You can also use the **Next** and **Back** links at the bottom of the forms to cycle through the image pages in your report.
3. Click in any of the fields on the displayed page to edit or enter data.

Note: If you make changes to any of the fields that already have data in them, you need to lock that field so your data is not overwritten the next time your report is saved. Place your cursor in the field you changed, then click the **Forms** menu, and select **Lock field from transfers.**

Place Photos

To place a photo into a report:

1. In the Images PowerView, click the image page you want to edit in the **Images Page** pane on the left.
2. Find the desired photo using any of the methods described in the Images Database section of this user guide.
3. Click and drag the desired photo over to one of the photo positions on the selected form.

Alternatively, you can also right-click a photo slot and select **Load photo from file...** to manually locate and place a photo.

Note: If you switch to **Windows 8**, Windows prevents access to the drag and drop feature in WinTOTAL, even with UAC disabled. Because the **Windows 8** security features prevent this function from working properly in WinTOTAL, **we are not be able to support the drag and drop feature**. However, future versions of our TOTAL software will support this feature.

Edit Images

In an ideal world, every photo you take is perfect. But in the real world, images are often over- or under-exposed or must be cropped to eliminate unwanted obstructions. WinTOTAL's **Image Optimizer** is designed to help with just such tasks. To edit any photo….

1. From the Images PowerView, double-click any thumbnail or full image to open the **Image Optimizer**. Or, select the image and click **Optimize** in the toolbar.
2. Then, in the Image Optimizer, just edit your images with any of the provided options. Options include:
   - Light adjustment
   - Size changes
   - Color scale
   - Cropping
   - Sharpness
   - Annotation
   - File size
3. As necessary, click the **Show All Report Images** button to the bottom left of the **Image Optimizer** to see all the images in your current report, drag a corner of the image optimizer to expand it, or click Restore Image to revert your changes back to the original photo.

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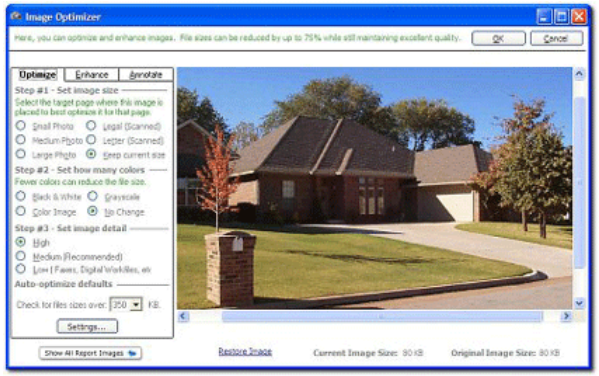
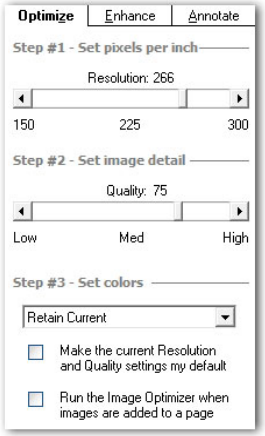


Optimize Images

The options in the **Optimize** tab of the **Image Optimizer** allow you to minimize the size of your images, while maintaining photo quality. To "optimize" your image…

1. On an image page, double-click any image to open it in the Image Optimizer.
2. In the Image Optimizer, click the **Optimize** tab.



3. **Set pixels per inch**: This setting will change the resolution (the number of "dots" per inch) of the image. A lower number will decrease both the dimensions and the file size of the image.
4. **Set image detail**: This setting changes the quality of the image, sometimes known as compression. A lower quality will reduce the file size while reducing the visibility of image details.
5. **Set colors**: This setting will have the smallest effect on file size. You'll probably find that you rarely need to change the colors of the image, but you're welcome use the drop-down to try different settings.
6. Choose **Make the current Resolution and Quality settings my default** if you'd like to use your current settings as the default for future optimization.
7. Choose **Run the Image Optimizer when images are added to a page** if you always intend to optimize images in your report.
8. When you're finished, click **OK** to apply your changes.

Hint: While you're optimizing your image, keep an eye on the lower portion of the screen. You can quickly see the effect that your changes are having on the file size as the current image size is displayed, along with its original size.

Automatic Optimization

The Image Optimizer provides a simple way to apply your preferred optimization settings automatically as you place images into your report. To set up automatic optimization so that you don't have to manually optimize your images…

1. In WinTOTAL, click **Options**, **Configure WinTOTAL settings...**
2. Click **Image Quality Settings** in the lower left of the **Configuration Options** window.

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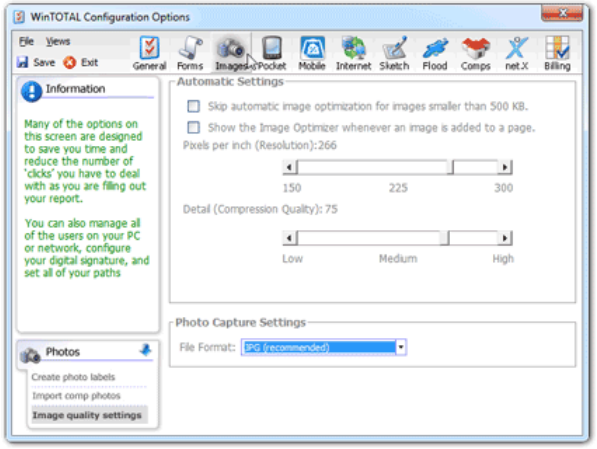

WinTOTAL Configuration Options
File Views
Save Exit
General Forms Images Pocket Mobile Internet Sketch Flood Comps netX Billing
Information
Many of the options on this screen are designed to save you time and reduce the number of 'clicks' you have to deal with as you are filling out your report.
You can also manage all of the users on your PC or network, configure your digital signature, and set all of your paths
Automatic Settings
Skip automatic image optimization for images smaller than 500 KB.
Show the Image Optimizer whenever an image is added to a page.
Pixels per inch (Resolution):266
150 225 300
Detail (Compression Quality): 75
Low Medium High
Photo Capture Settings
File Format: JPG (recommended)
Photos
Create photo labels
Import comp photos
Image quality settings

3. On the right, mark your preferred optimization settings. Options include:

   Skip automatic image optimization for images smaller than 500 KB: This will keep the Image Optimizer from making changes if an image is smaller than 500 kilobytes (KB), since images of this size may not need to be much smaller than they already are.

   - **Show the Image Optimizaer whenver an images is added to a page**: Automatically brings up the Image Optimizer for each image - perfect if you already know that you'll be optimizing every image.

   - **Pixels per inch (Resolution):** Choose the resolution to which you'd like to automatically optimize your report images.

   - **Detail (Compression Quality)**: Choose the detail to which you'd like to automatically optimize your report images.

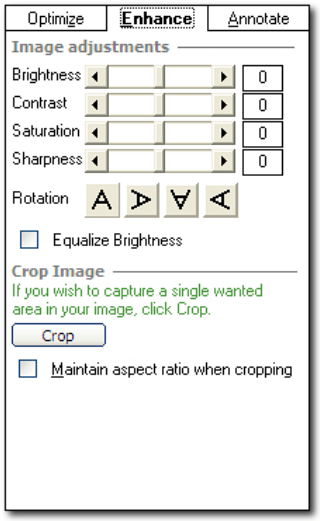
   - **Photo Capture Settings**: This determines the type of file that will be used when you capture photos within WinTOTAL.

4. Click **Save** in the upper-left to commit your changes and close the window.

Enhance Images

The options in the **Enhance** tab of the **Image Optimizer** help you adjust for lighting, color or rotation problems. In addition, you can use the **Crop** tool to eliminate unwanted features from pictures. To "enhance" an image in your report…

1. In the Image Optimizer, click the **Enhance** tab.



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2.Apply your preferences to your image as necessary. Options include:

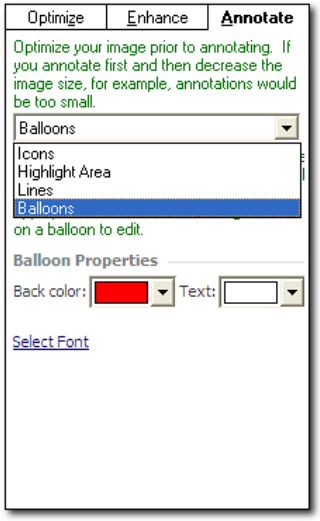
- Slide the **Brightness**, **Contrast**, **Saturation** and **Sharpness** controls to the left or right to adjust the appearance.
- Click the rotated "**A**" buttons to spin your image to the proper orientation.
- **Equalize Brightness** attempts to balance your photo automatically.
- To eliminate unwanted items from your image, click **Crop**. Then, click and drag a rectangle around the portion of the image you want to keep. When you release the mouse button, the image crops automatically. If you want your cropped image to have the same height and width ratio as the original, check the **Maintain aspect ratio when cropping** box before you crop it.

3.When you're finished, click **OK** to apply your changes.

Annotate Images

The annotation tools in the **Annotate** tab of the **Image Optimizer** allow you to add icons, balloon text and other items to your images. To annotate your images:

1.In the **Image Optimizer**, click the **Annotate** tab.



2.Apply your preferred annotations using the options provided. Options include:

- **Icons** - In the **Icon** area, you can choose **Color**, **B&W** or **Legacy** icons.
  1.Select the desired icon. Then, click anywhere in the image to place that icon.
  2.Click and drag the icon to move it around.
- **Highlight Area** – You can highlight a portion of your image to draw attention to certain aspects of the property.
  1.To highlight an area, first choose the size of the line around the highlighted area from the **Width** drop-down menu.
  2.Then, click the **Fill Color** and **Line Color** links to select the color for your highlighted area.
  3.Click the image to anchor the first corner of your area.

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4. Continue clicking to surround the area desired. Instead of drawing the last line, just double-click or press **A** to complete the area.

> **Note:** You can also use the **Highlight Area** tool to obscure or "black-out" photo elements such as family photos, religious artifacts, people, yard signs, and other portions of your photo.

- **Lines** – As with highlighting your image, drawing lines on the image can be a good way to draw attention to certain aspects of the property.

  1. To draw a line on your image, choose the desired size for your line from the thickness from the **Line Width** drop-down menu.
  2. Click **Line Color** to choose the color.
  3. Click and draw the desired line across the image.

- **Balloons** – Balloons often pair well with lines and highlighted areas as a way of designating and explaining key aspects about the property.

  1. To add a balloon, choose a background color, text color and font for the balloon from the drop-down menus.
  2. Click the image to place the balloon.
  3. Type the text for your balloon in the box available and then click **OK**.
  4. Once a balloon is placed, click and drag the balloon or its square "handles" to reposition or resize the balloon.

> **Note:** When you click another tab to leave the annotations section, all annotations become one item and you cannot go back and reselect or edit individual modifications.

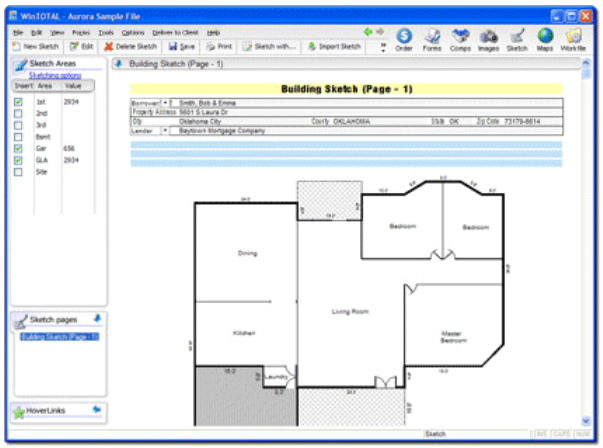
3. When finished, click **OK** to apply your changes.

Sketch PowerView

WinTOTAL's new VIP integration system now allows any sketch vendor to integrate directly with WinTOTAL. If you've been using the custom integrated version of Apex 3 inside WinTOTAL, that will continue to function normally, but if you want to use a different sketch vendor like AreaSketch or RapidSketch, those alternatives are also available and can integrate directly with WinTOTAL.

> **Note**: If you have any questions about licensing or usage for these sketch programs, you should contact your sketch manufacturer directly.

This user's guide, discusses key integration points for these applications, as well as certain key options that are available in WinTOTAL to facilitate your sketching and sketch management. To access WinTOTAL's Sketch PowerView, click **Sketch** in the upper right corner of WinTOTAL.



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Choose Your Sketcher

While the sketch configuration utility inside WinTOTAL allows you to set your preferred sketching software and authorize it all in one location, you can still select a sketcher you'd like to use in WinTOTAL from the Sketch PowerView. To select a preferred sketcher from…

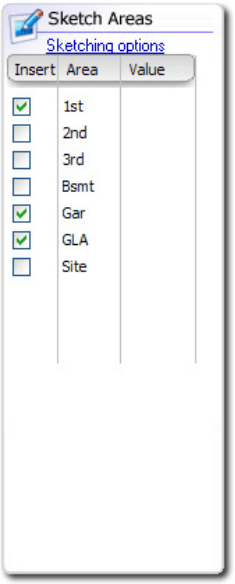
1. From the Sketch PowerView, click the **Sketch With** button in the toolbar.
2. In the list of sketch vendors that appears, select your preferred sketching software.
3. When you try to draw a new sketch WinTOTAL prompts you to authorize your sketcher. If you'd simply like to demo it, choose Demo Mode and click **Next**. Otherwise, choose an authorization method to authorize the sketcher immediately.

Note: TOTAL Sketch is a la mode's free sketching solution provided with WinTOTAL. If you prefer to use TOTAL Sketch as your sketching program, no registration or authorization is required. Click here to learn how to use TOTAL Sketch.

TOTAL Sketch Pro

License Manager

Sketch Areas



Thanks to the power of WinTOTAL's VIP integration, your sketching software can insert key calculations from your sketch into the appropriate slots on your forms automatically. For example, by default, the Gross Living Area is calculated from the sketch and transferred to the comps grid of the URAR. You can also enable additional transfers. To enable additional transfers, check the box(es) beside the calculations you'd like to transfer into your report from the **Sketch Areas** pane of the Sketch PowerView.

Import Old Sketches

To help save you time, WinTOTAL can import sketches from your old reports. If you need to import an old sketch…

1. In the Sketch PowerView, click **Import Sketch** in the toolbar at the top of the screen.
2. Use the **Folders** list on the left to locate and select the WinTOTAL folder containing the report from which you

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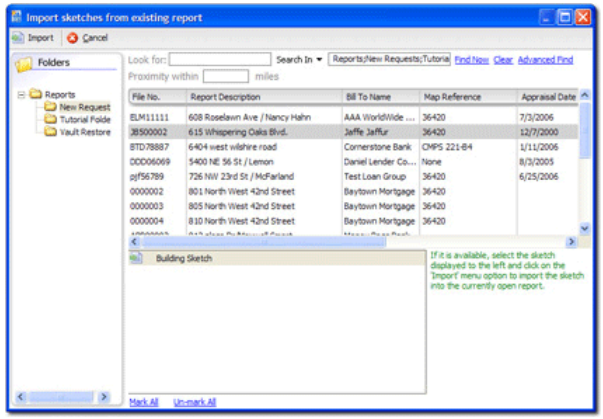
want to import a sketch. On the right, all of the reports in that folder are displayed.



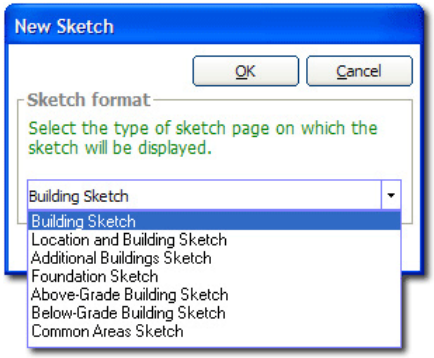
3. Click the report in the list to see any sketches found in that report. Once you've selected the desired report, click **Import**.

Note: If you need help finding a particular report, use the search capabilities in the **Import Sketches** screen. Type a street name or other criteria in the **Look for** box, then select the folders you'd like to search from the **Search In** drop-down menu. Click **Find Now** to display all of the reports that meet your criteria. For even more searching power, click the **Advanced Find** link, enter your criteria in the text boxes and click **Find**.

Create Sketches

To create a new sketch in your WinTOTAL report…

1. In the Sketch PowerView, click **New Sketch** in the toolbar at the top of the screen.
2. From the drop-down menu in the **New Sketch** screen, select the type of sketch you want to create, and then click **OK**. Sketch types include:
   - Building Sketch
   - Location and Building Sketch
   - Additional Buildings Sketch
   - Foundation Sketch
   - Above-Grade Building Sketch
   - Below-Grade Building Sketch
   - Common Areas Sketch



3. WinTOTAL launches your preferred sketching software.
4. Now, just draw your sketch as usual using your preferred sketching software.

Note: If you decide to remove your new sketch at any time, click **Delete Sketch** in the **Sketch** PowerView to remove it.

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Maps PowerView

Mapping is a critical component of the appraisal process. Today's technology not only allows you to quickly generate simple maps, but also choose between classic street maps and true aerial photographs that you can annotate and enhance to display information critical to the property value. Plus, you can gather additional data — FEMA map numbers, Census tract information and proper postal coding — about properties based on their location. Flood maps also play an important role in your reports. WinTOTAL's built-in tools can help you retrieve all of these types of maps and data without leaving your report to hunt for the data on the Internet or in public records. Of course, if you need a map that WinTOTAL can't provide you, you can always locate a wealth of other maps — plat, topography, demographic — through the Internet and use WinTOTAL's tools to insert them into your report. To access all of WinTOTAL's mapping tools, click **Maps** in the upper right corner to open the **Maps** PowerView.

Set Up Map Preferences

The **Maps** PowerView provides several different options you can define to tell WinTOTAL how it should retrieve a map and what it should display in the balloons. To edit your map options…

1. In the Maps PowerView, click the **Options** link in the **Map pages** pane on the left side of the screen.
2. Mark your preferred options. Options include:
   - **Get location map -** Mark this option if you want the Map Wizard to retrieve a location map.
   - **Center on subject** - Centers the location map on the subject property.
   - **Get flood, census, and USPS data** - Mark this option if you want the Map Wizard to retrieve flood, census, and USPS data for your report.
   - **Get FEMA flood map from InterFlood** - If you want the Map Wizard to download flood maps from your InterFlood account, mark this option and then indicate whether you always want to retrieve a flood map or just want a flood map whenever the subject property falls in a flood zone.
   - **Use high resolution (1200 x 1800) maps** - Retrieves a higher quality map so that the map is better defined in print and PDF. Keep in mind that this option may make your map appear fuzzy while it's on your screen, but actually improves the print and PDF quality/clarity of your map.
   - **Display property details so that I can verify address or enter their GPS coordinates before getting maps** - If you use a GPS device to retrieve the latitude and longitude of the properties in your report or if you want to always verify the property addresses before generating a map, mark this option.
   - **Place Comps**, **Place Rentals**, and **Place Listings** - Check the boxes for each type of property you want to display on your maps. If you may need any one of these options in your future reports, check them all. WinTOTAL only places balloons on your maps for properties that are in your current report so if you

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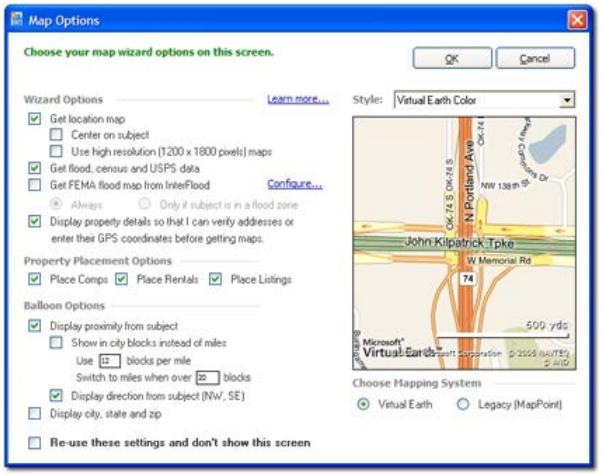
don't have any rentals, for instance, no rental balloons would appear on your map.

- **Display proximity from subject** - Mark this option if you want to show the distance from the subject to each comp, rental, or listing in your comp/rental/listing balloons.
- **Show in city blocks instead of miles** - If you've set WinTOTAL to show the distance from the subject on each balloon in your map, you can also set it to use city blocks as the distance unit within a certain distance from the subject. Just mark this option and then specify the number of blocks that correspond to a mile and the number of blocks at which WinTOTAL should switch to miles as the unity of measurement.
- **Display direction from subject** - Mark this option to include the direction from the subject in your comp, rental, and listings balloons.
- **Map Style** - Choose a map style to change the color and look of your maps. As you select a style, a live preview appears below so you can verify that you want to use that style.
- **Mapping System** - Depending on your needs, you can set WinTOTAL to retrieve basic street maps from Microsoft's MapPoint (Legacy) or have WinTOTAL use Microsoft's Virtual Earth to retrieve street maps, aerial photographs, or hybrid street maps/aerial photographs. Since Virtual Earth is capable of retrieving basic street maps, unless you prefer a different map style than what is available with Virtual Earth, we recommend leaving this option set to **Virtual Earth**.
- **Re-use these settings and don't show this screen** - If you'd prefer not to be prompted about your map preferences each time you retrieve a map, mark this option. Otherwise, leave the box unchecked if you prefer to manually alter your settings for each map you retrieve.



3. When finished, click **OK** to apply your changes.

Get Maps

WinTOTAL's Maps Wizard help you quickly and easily retrieve an electronic map you can insert into your report. To insert a location map and retrieve additional data about your subject property…

1. In the Maps PowerView, click **New Map** in the toolbar.
2. If you're retrieving a map in WinTOTAL for the first time or if you've set WinTOTAL to prompt you each time, a window of options appears. Set your map preferences and click **OK**.

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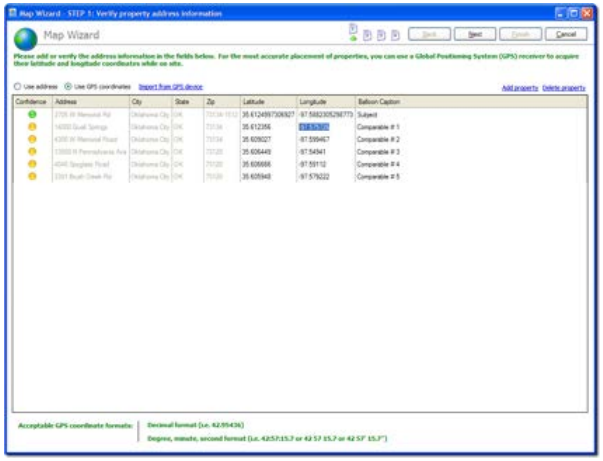
3. There are four total steps in WinTOTAL's Map Wizard to help you retrieve a location map, flood map, or flood and census data. Depending on your map preferences, not all steps will appear for every map that you insert into your report. Steps include:

   - Confirming your address/GPS information
   - Retrieving and annotating a location map
   - Retrieving flood and census data
   - Retrieving and annotating a flood map

Verify Address/GPS Data

If your map preferences are set to prompt you about address/GPS data before retrieving each map in your report, you're asked to verify and update this information as you start the Map Wizard.

1. In the first step of the Map Wizard, indicate whether you want to retrieve a map by looking up the addresses of the properties in your report or by using exact GPS coordinates.



2. Verify the address/GPS data displayed in the grid. If the information is incorrect or you need to adjust it, click a field you wish to edit and then type in your changes.
3. If you own a supported GPS and would like to import the coordinates from your GPS device, you can do so.

   - **To configure your GPS** - Plug your USB GPS device into your computer, click **Import from GPS Device**, and then click **Configure**. Select your type of GPS from the list provided and click **OK**.
   - **To import coordinates from your GPS** - Plug your USB GPS device into your computer, click **Import from GPS Device**, check the boxes beside each coordinate you want to import and select the appropriate property address for each coordinate from the menus on the right. Then, click **OK** to import the coordinates for your map.

4. When finished, click **Next** to continue through the Map Wizard.

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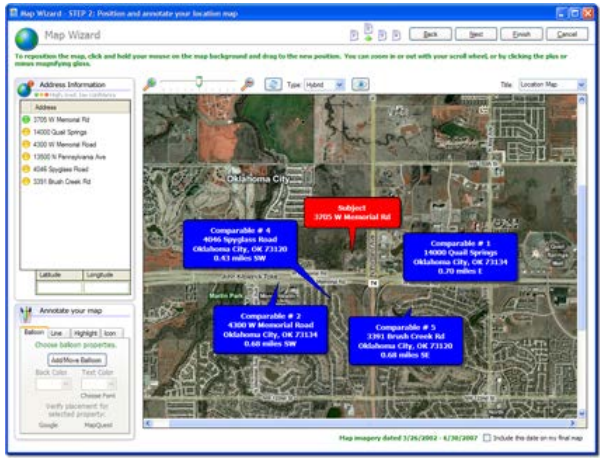
Retrieve a Location Map

WinTOTAL's Map Wizard can retrieve several different types of map depending on your needs and you have full control to adjust the map for your current report.

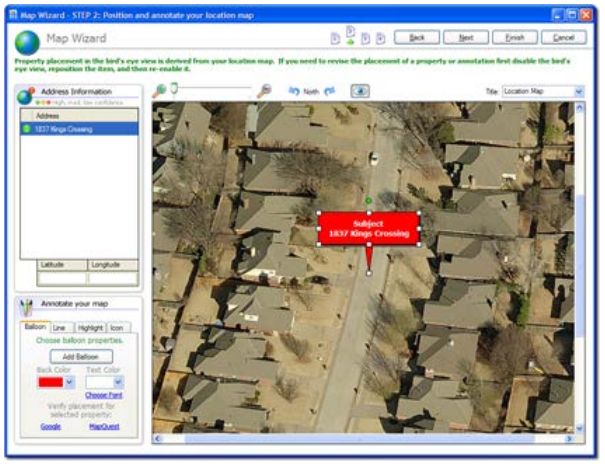
1. In the second step of the Map Wizard, specify a map type in the **Type** drop-down menu. Types include:
   - **Road Map** - A typical street map like those that have always been available in WinTOTAL
   - **Aerial Map** - A satellite photograph of the area containing your properties
   - **Hybrid Map** - A satellite photograph of the area containing your properties with street names and details overlaid



Hint: If your Internet connection stalls or the map does not load for any other reason, just click the **Refresh** button above the map area to force WinTOTAL to retrieve the map again.

Note: If you retrieve an aerial or hybrid map it may contain a range map dates in the bottom right corner. Unlike traditional street maps, aerial and hybrid maps are built from a series of photograph panels taken at different times. This date range just means that your map area is built out of multiple panel photographs taken at different times.

2. WinTOTAL can also display bird's eye view maps depicting an oblique overhead view of your subject property for reference purposes. To view a bird's eye map of the property, click the eye icon to the right of the type drop-down menu. Bear in mind, bird's eye view maps cannot be printed, annotated, or placed in a report. You must select a different map type before proceeding.



3. Once WinTOTAL finishes retrieving the map you request, you can adjust the map's zoom and centering.
   - To re-center the map, click anywhere on the map, hold down the click, and move your mouse in the opposite direction you wish to move the map.

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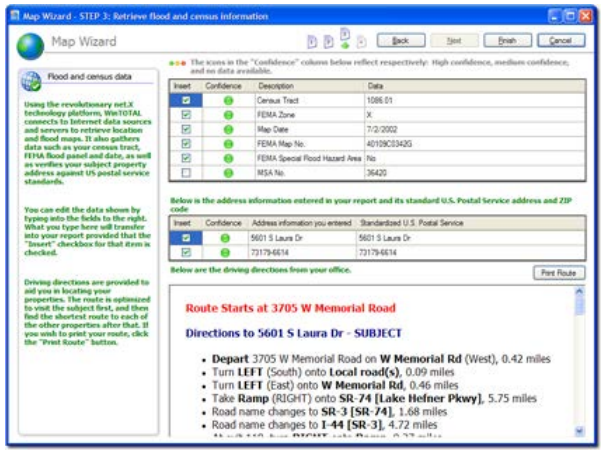
- To change the map zoom, click on of the zoom levels across the top of the map or use the scroll wheel on your mouse to zoom in and out.

4. Next, select a pre-named title or type in a title for your map using the **Title** field to the upper right corner of the map.
5. As necessary, you can edit and annotate your map using the tools provided. To simply move or verify the placement of a balloon, you have several options:
   - To move the balloon's head, click and drag the head of the balloon to the desired location
   - To move the tail of the balloon, click the white square at the end of the tail and drag it to the desired location
   - To move the balloon based on a property's GPS coordinates, click the property address in the Address Information pane and type in the correct GPS coordinates
   - To manually move an entire balloon, click to select the balloon, then click **Add/Move Balloon** in the **Balloon** tab on the left. Then, click the desired location for the tail of the map to move the entire balloon to the new location
   - If you believe the balloon's placement is incorrect, you can verify it against Google's Maps and MapQuest. Just click the questionable balloon to select it and then click the **Google** or **MapQuest** links to call up the same maps in Google or MapQuest so you can compare maps.
6. When finished customizing your map, click **Next** to continue through the Map Wizard or click **Finish** if you're not retrieving any other map information.

Retrieve Flood & Census Data

If your map preferences are set to retrieve flood and census data, in the third step of the Map Wizard, WinTOTAL retrieves the flood and census data for your subject property along with the USPS formatted address for your subject.

1. Review the flood and census data items that WinTOTAL retrieves. WinTOTAL's confidence in the data is indicated by a red, yellow, or green stoplight. If you're satisfied with the data, check the **Insert** box beside it to include it in your report.
2. Next, review the USPS formatted address of the subject property. As with flood and census data, WinTOTAL ranks its confidence in the retrieved data by a red, yellow, or green stoplight. If you're satisfied with the format of the USPS address and zip code of your subject property, check the **Insert** boxes beside each address item to use them in your report instead of your hand typed address.


Map Wizard - STEP 3: Retrieve flood and census information
Map Wizard
Back
Next
Finish
Cancel
Flood and census data
Route Starts at 3705 W Memorial Road
Directions to 5601 S Laura Dr - SUBJECT
Depart 3705 W Memorial Road on W Memorial Rd (West), 0.42 miles
Turn LEFT (South) onto Local road(s), 0.09 miles
Turn LEFT (East) onto W Memorial Rd, 0.46 miles
Take Ramp (RIGHT) onto SR-74 [Lake Hefner Pkwy], 5.75 miles
Road name changes to SR-3 [SR-74], 1.68 miles
Road name changes to I-44 [SR-3], 4.72 miles

3. For your convenience, WinTOTAL also retrieves directions from your office to each property included in your map.

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Review those directions in the bottom half of the screen and click **Print Route** if you want to print off a copy.

4. When finished, click **Next** to continue through the Map Wizard or click **Finish** if you're not retrieving any other map information.

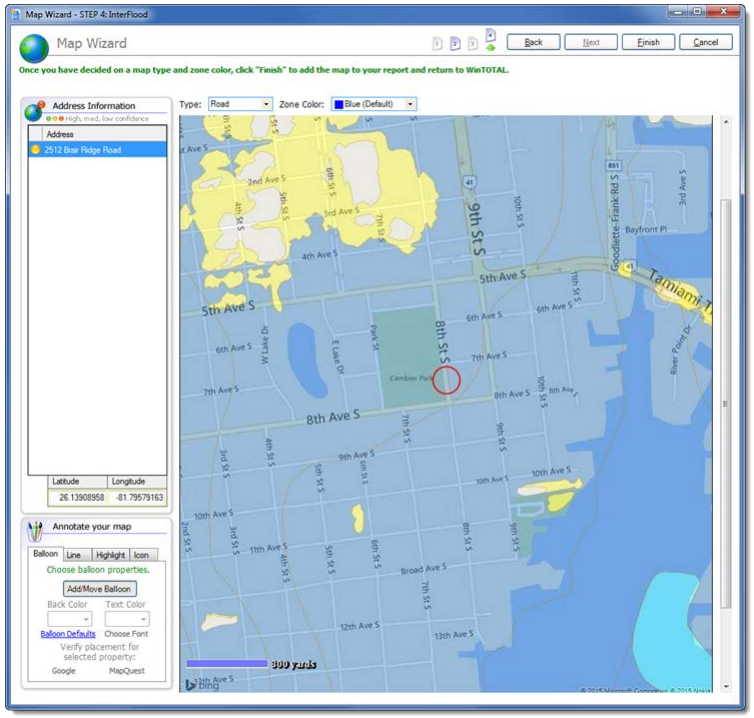
Retrieve a Flood Map

If your map preferences are set to retrieve a flood map, in the fourth step of the Map Wizard, WinTOTAL retrieves the flood map for your subject property.

1. In some cases, WinTOTAL may find several flood maps that apply to your subject property. Click the drop-down menu above the map area to preview the other maps that WinTOTAL finds (if any).

2. As necessary, you can edit and annotate your map using the tools provided. To simply place the subject balloon, click the **Add/Move Subject** button in the **Balloon** tab on the left. Then, click the location on the map where you wish to place the subject balloon to insert it into the map.

3. When finished, click **Finish** to complete the Map Wizard and insert your maps and data into your report.



Edit Maps

In the second and fourth steps of the Map Wizard, you can annotate your maps to meet the requirements of each report. Annotation tools include:

- Call out balloons
- Lines
- Highlighting
- Icons

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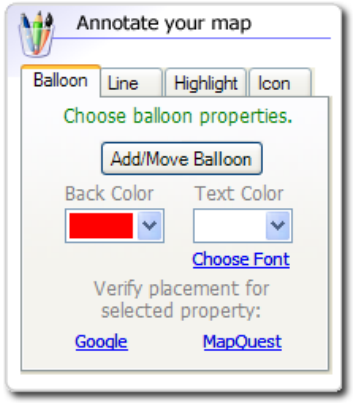
Balloons

To add or modify a balloon in your map...

1. Click the **Balloon** tab in the **Annotate your map** pane on the left.



2. Click **Add/Move Balloon** and then click the place on the map where you wish to move/place the balloon.

3. In the screen that appears, mark one of the existing balloons to move it to the new location or click the **Create new custom balloon** option and type in a label to create a new balloon. Then, click **OK** to move/place the balloon.

4. Then, you can change the text, font, or coloring on each balloon.
   - To change the font on a balloon, click to select the balloon you wish to change, then click the **Choose Font** link in the **Balloon** tab on the left. In the screen that appears, mark your font style, formatting, and size. Then, click **OK** to update the font.
   - To change the font or balloon color, click to select the balloon you wish to change. Then, select your preferred font or balloon color from the **Text Color** or **Back Color** drop-down menus respectively.

5. As necessary, you can validate WinTOTAL's placement of each balloon by comparing it with the same property locations in other service providers. If necessary, click to select a balloon and then click the **Google** or **MapQuest** links in the **Balloon** tab on the left to view a Google or MapQuest map for comparison.

6. As necessary, you can remove any balloon on your map. Just click to select the balloon and then press the **Delete** key on your keyboard.

When you're finished editing your map, remember to click **Next**, **Back**, or **Finish** to save your changes.

Lines

To add a line to your map...

1. Click the **Line** tab in the **Annotate your map** pane on the left.

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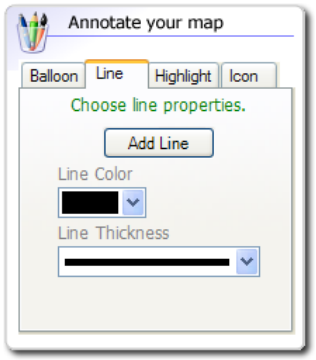


2.Click **Add Line** and then click and hold the mouse button. With the mouse button clicked, move your mouse to draw a line on your map.

3.As necessary, click to select a line on your map and use the **Line Color** and **Line Thickness** drop-down menus to change the color and width of the line.

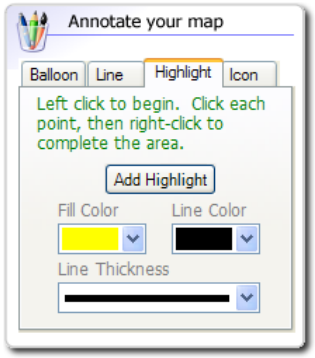
4.As necessary, click to select any line in your map and press the **Delete** key on your keyboard to delete it.

When you're finished editing your map, remember to click **Next**, **Back**, or **Finish** to save your changes.

Highlight

To highlight an area on your map...

1.Click the **Highlight** tab in the **Annotate your map** pane on the left.



2.Click **Add Highlight** and then click your map to place a starting point for your highlighted area.

3.Drag your mouse to create a border around your highlighted area. When you're satisfied with your line, click to place the line and set a new starting point.

4.Repeat this process until you've created a border around the area you wish to highlight. Then, right-click your mouse to set the highlighted area.

5.As necessary, click the highlighted area and use the **Fill Color**, **Line Color**, and **Line Thickness** drop-down menus to alter the styles on your highlighted area.

6.As necessary, click to select any highlighted area and press the **Delete** key on your keyboard to delete it.

Icons

There are a variety of icons you can place on your map to indicate landmarks, directionality, and a variety of other items. To place icons on your map...

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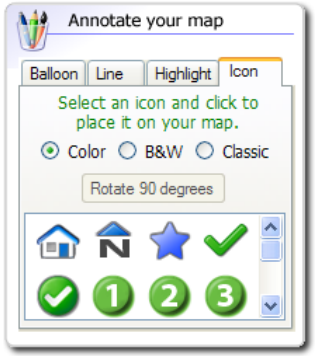
1. Click the **Icons** tab in the **Annotate your map** pane on the left.

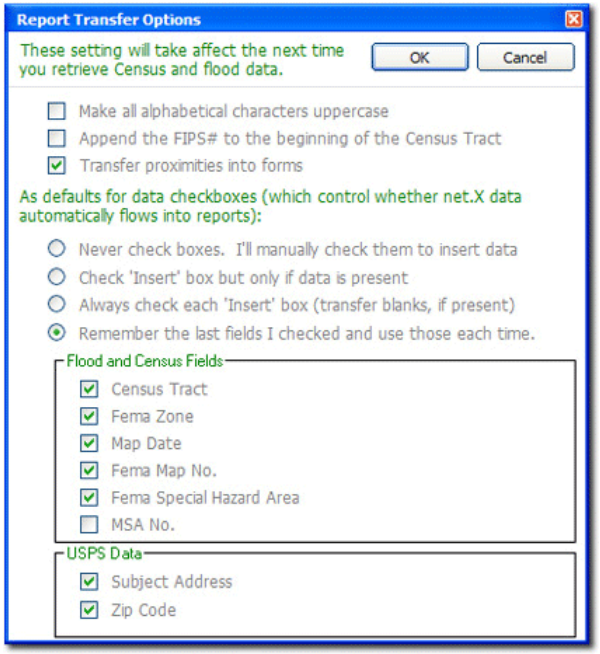


2. Mark **Color**, **B&W**, or **Classic** to select an icon set.
3. Scroll through the icons at the bottom of the **Icons** tab and click to select one you wish to place.
4. Then, click your map to place the selected icon.
5. As necessary, click any icon on your map and click **Rotate 90 degrees** in the **Icons** tab to rotate it.
6. As necessary, click any icon and press the **Delete** key on your keyboard to delete it.

Report Transfer Options

If you need to customize the way that WinTOTAL retrieves map related information so that it does so in all caps, only retrieves specific pieces of information, or gets property proximities as well, you can apply your preferences through WinTOTAL's Report Transfer Options. To apply your mapping and FEMA/Census data preferences…

1. In the Maps PowerView, click the **Report transfer options** link at the top of the **Information** pane.


Report Transfer Options
These setting will take affect the next time you retrieve Census and flood data.
OK
Cancel
Make all alphabetical characters uppercase
Append the FIPS# to the beginning of the Census Tract
Transfer proximities into forms
As defaults for data checkboxes (which control whether net.X data automatically flows into reports):
Never check boxes. I'll manually check them to insert data
Check 'Insert' box but only if data is present
Always check each 'Insert' box (transfer blanks, if present)
Remember the last fields I checked and use those each time.
Flood and Census Fields
Census Tract
Fema Zone
Map Date
Fema Map No.
Fema Special Hazard Area
MSA No.
USPS Data
Subject Address
Zip Code

2. Mark your preferred options. Options include:
   - **Caps** - Check the first option to have your FEMA, Census and USPS data converted to all uppercase before they're inserted in your reports.
   - **FIPS #** - The National Institute of Standards and Technology issues a set of codes that identifies geographic entities in the United States. Check the second box to insert these Federal Information Processing Standards (or FIPS) into your report along with the census tract information. For more information about FIPS codes, visit the US Census website at http://www.census.gov/geo/www/fips/fips.html.

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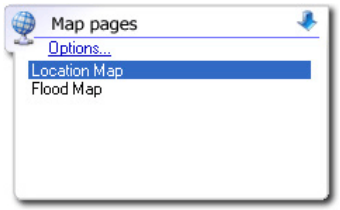
- **Property Proximities** - If you'd like the distance from your subject property to each comp transferred directly into the comps grid, mark the **Transfer proximities** option.
- **FEMA/Census Data Retrieval Options –** The final set of options allows you to indicate how WinTOTAL should decide what information it needs to retrieve and embed into your report when it downloads a map. The options included in this set are:
- **Never check boxes** - If you rarely use the FEMA, Census or USPS information, mark this option so that you can manually select each item you want to insert into your report as you retrieve your maps.
- **Insert if data is present** – Only inserts the data into your report if it is available, allowing you to manually enter it whenever it isn't available.
- **Always check each box** – Always inserts the data retrieved from our net.X servers and inserts blanks whenever the data is not present.
- **Remember the last fields I checked** - Remembers which items you selected the last time, and re-selects those by default. By using this option, you can also mark the boxes beside any of the data you want WinTOTAL to transfer into your report automatically, leaving the data you don't want unchecked.

3. When finished, click **OK** to apply your changes.

Work with Maps

Once maps have been added to your report, you have several options for working with those maps. To edit maps that are already in your report…

1. From the Maps PowerView, click a map page you want to edit in the **Map Pages** pane on the left.



2. Then, you can edit several aspects about the map using the options provided. Options include:
   - **Editing the Map Form** – Just edit the text in the map form by typing directly into the form.
   - **Collapsing/Expanding Map Pages** - Click **Collapse All** to reduce the forms to headers. Then, click the header of the form you want to edit to expand it. Click the header again to collapse it. Or, click **Expand All** to expand all of the forms at once.
   - **Replacing the Current Map** - To replace an existing map, select the map in the **Map pages** pane and then click **Replace** in the toolbar. Depending upon the type of map you select, the wizard launches with those options selected.
   - **Editing the Existing Map** - Selecting a map and clicking **Edit** reopens the map in the **Map Wizard** where you can further enhance it.

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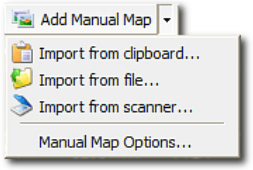
- **Deleting the Map** - To delete a map, select it and click **Delete**.

Add Maps Manually

If you have a map, such as a plat map, that you wish to add into your report from another source like a print out or website, you can easily add it into your report. To add a map into you report manually…

1. From the Maps PowerView, click the down arrow beside **Add Manual Map** and choose the source for your map from the menu that appears.



   - **Import from Clipboard –** Use this to copy an image or map from another page or from the Internet. First, select the image at its source and copy it to the clipboard.
   - **Import from File** - Select this option, then browse your system to find any image or map file. Click **Open** to retrieve that image.
   - **Import from Scanner** – If you have a hard copy of a document you wish to include, select this option to launch your scanner software and retrieve the image.

2. Whichever option you choose, your map is loaded in the Image Optimizer, where you can further enhance or modify it.
3. At the top of the Image Optimizer window, select a form type from the **Page type:** drop-down menu.
4. In the **Form title** text box, type the name you'd like to have appear at the top of the form.
5. Click **OK** to place the map into your report.

Workfile PowerView

One of the most useful tools in WinTOTAL, the digital workfile not only helps you retain all of the supporting documentation used to create the report in an easy-to-find electronic format, but it also allows you to comply with USPAP guidelines for storage of your appraisals. On top of that, archiving your reports electronically can save you money and free up space in your office for actual work!

The documents that make up your workfile are the same as those that once took up space in your paper files: MLS sheets, plat maps, title info, site sketches, field notes. These documents can be other electronic files, like MS Word or Excel documents, extra electronic photos, or even PDF "printouts" of web search results. But your workfile can also contain digitized copies of your paper documents – easily converted using a scanner or our innovative DirectFax service.

You can add and view workfile attachments directly in the Appraisal Desktop or through the **Workfile** PowerView in WinTOTAL. See the Workfile View section in the Appraisal Desktop chapter of this user guide for more details.

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Add Files

To add a file to the workfile from the **Workfile** PowerView…

1. From the Workfile PowerView, add the files you need to store for USPAP compliance directly into the workfile. There are several ways you can add files into your workfile.

Browse – Click **Browse** in the toolbar and use the standard Windows **Open** screen to navigate your system, select a file and click **Open**. To select multiple files at once, simply hold down **Ctrl** on your keyboard and click the files you wish to add to your workfile.

Scan – This option uses your attached scanner to scan any document directly into the digital Workfile. When you click **Scan** in the toolbar, WinTOTAL presents you a list of the installed scanners. Select the desired device from the list and click **Select.** Your scanner software launches and guides you through the scanning process. At the end, the resulting document is inserted directly into your report's workfile. For help with your scanner software, please consult the documentation that came with your device.

DirectFax – A powerful new service offered by a la mode. Click **Create** in the toolbar to print a custom fax cover sheet for this report. Any documents faxed to a la mode using this special cover sheet are automatically attached to your report's digital workfile. See the DirectFax section of this user guide for more information.

2. Once you've added all the files you need into your workfile, remember to click **Save** to save your workfile.

Manage Files

Once your files are added to the workfile, they appear in the file list. As with all WinTOTAL file lists, clicking any of the headers sorts it by that item, allowing you to quickly find any document in your workfile. To manage the documents in your workfile, visit the workfile and use one of the following options.

- **Opening and viewing documents** - To view any of your workfile documents, double-click it, or select it and click the **Click here to open document** link in the **File Details** pane on the left. WinTOTAL attempts to open whatever application created the original file. Thus, if it is a MS Excel file, WinTOTAL loads Excel and opens the document. Likewise, if it is a PDF file, WinTOTAL opens Adobe's Acrobat Reader.

- **Handling unknown document types -** If WinTOTAL cannot automatically find the application that created your workfile document, it notifies you and gives you the opportunity to select an application from your system.

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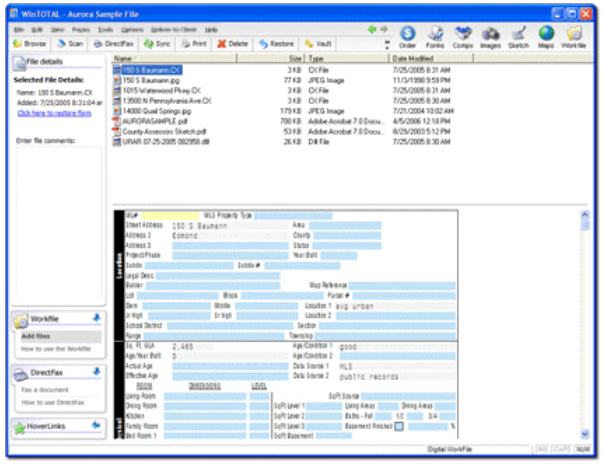

- **Adding comments -** Since file names can often be brief and difficult to decipher, you can also add comments to each of your documents. Click any file and then type your notes into the **Comments** field in the **File Details** pane on the left side of the screen. These comments are then stored with your workfile and displayed whenever you click the file in the list.

- **Restoring files –** Certain file types stored in your workfile are actually items from your report. For example, whenever you change major forms in your report, a copy of the old form is automatically placed in the workfile. If you decide you need to return to the original form, you can quickly restore the old report. Likewise, if you delete a comparable from your report, you're given the opportunity to store that comp in the workfile. If you need to add additional comps to your report following a review, you can quickly re-add these deleted comps to the report. To do so, just select the item in the list and then click **Restore** in the toolbar.

Note: If you restore a copy of your report with an old form, the new form is removed, along with any changes you may have made. At the same time, this form is also stored in your workfile.

DirectFax

The DirectFax system works in tandem with your Enterprise Appraiser XSite to convert all your paper workfile documents into one electronic file. Anybody can fax a document to special toll-free number using a custom cover sheet. You can fax supporting documents to yourself, or have your clients fax important supporting documents to you. These documents are converted to electronic files, and then attached directly to your report. To use DirectFax…

1. Gather up all of the supporting documents related to the current report.

2. Then, in the Workfile PowerView, click **Fax a document** in the **DirectFax** pane on the left.

3. Click **DirectFax** in toolbar to create and print a customized cover sheet for this report.

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Appraiser Sites by a la mode — DirectFax Cover Sheet

Fax To: 1-866-704-6542

STOP **Before faxing in your documents, you must print this page and use it as your cover sheet. Failure to do so, will result in your document not being routed properly.**

Report Information:

Report Description:	3705 W Memorial Rd
Property Address:	1837 Kings Crossing
File Number:	SAMPLE-101a

Company Information:

Company Name:	Baytown Appraisals
Address:	3705 W Memorial, Bldg 402 Oklahoma City, OK 73134
Phone:	(800) 211-4514
E-mail:	info@baytownappraisal.com

WINTL:40521053841207050742178261682391-8-018B70946C

Hint: You can use a tool like Adobe Acrobat to create an electronic version of the cover sheet, which you can then e-mail to your clients.

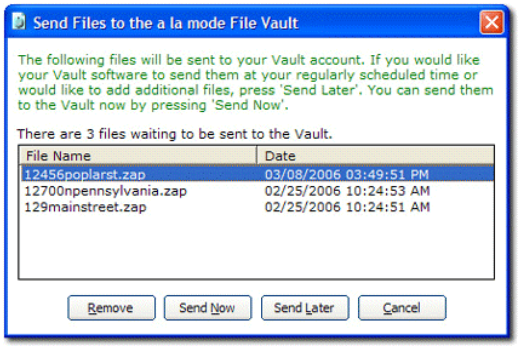
4. Fax all of your documents, with the cover sheet on top, to the toll-free number provided on the cover sheet.
5. Once the fax has been sent, click **Sync** in the toolbar to retrieve any faxed docs and add them to the list of workfile documents.
6. Double-click any DirectFax document to open it in the Acrobat Reader application.

Note: All documents that are faxed at one time are converted into one PDF file. Even though you may have different kinds of documents, they're all stored in one file. If you'd like to have them stored separately, use the same cover sheet, but fax them a few minutes apart.

Send Reports to Vault

Once your workfile is complete, you can send the entire report directly to your online Vault storage account. To do so…

1. In the Workfile PowerView, click **Vault** in the toolbar to upload the file.


Send Files to the a la mode File Vault
The following files will be sent to your Vault account. If you would like your Vault software to send them at your regularly scheduled time or would like to add additional files, press 'Send Later'. You can send them to the Vault now by pressing 'Send Now'.
There are 3 files waiting to be sent to the Vault.
File Name
Date
12456poplarst.zap
03/08/2006 03:49:51 PM
12700npennsylvania.zap
02/25/2006 10:24:53 AM
129mainstreet.zap
02/25/2006 10:24:51 AM
Remove
Send Now
Send Later
Cancel

2. Click **Send Now** to immediately send the file to the Vault or click **Send Later** to add it the net.X queue to go out to the Vault the next time you synchronize WinTOTAL with your Internet products.

Note: Whenever you send a file to the Vault, it is marked with a Vault icon in the **Vault** column of the File Cabinet to keep you informed about which files you've sent to the Vault and which remain to be sent.

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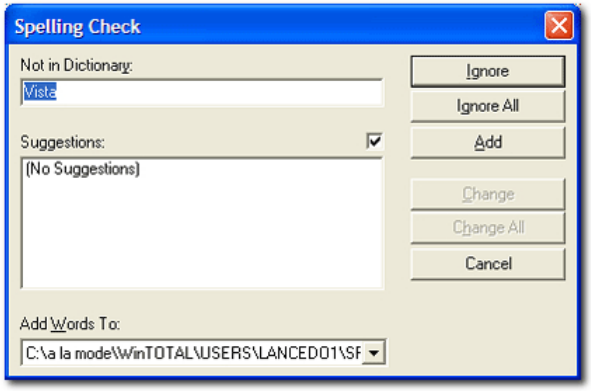
Tools

The **Tools** menu is WinTOTAL's centralized location for all of its time saving tools. In addition to the tools introduced in Athena, Aurora has a number of brand new tools like the **Change Case** tool to help you complete your appraisals quickly and easily.

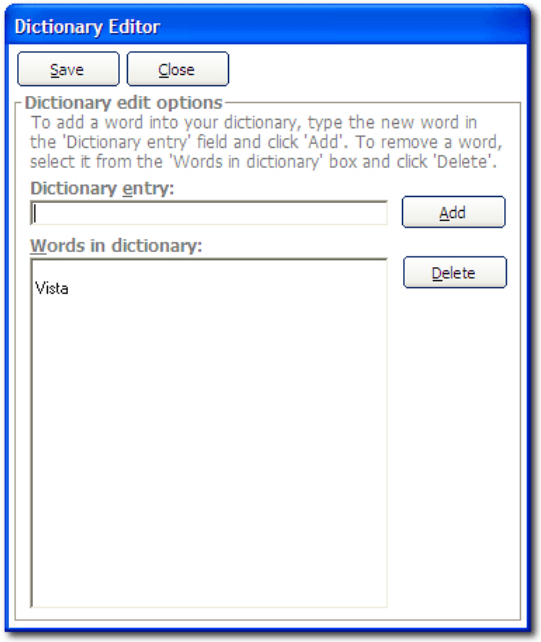
Spell Check

WinTOTAL's spell checker lets you spell check your entire report either all at once or piece by piece. You can also add words to the spell checker's dictionary. To use WinTOTAL's spell checker…

1. In the Forms PowerView, click **Spell** in the toolbar at the top of the screen to spell check the entire report or click the **Tools, SpellCheck, Check whole report** from anywhere in WinTOTAL.
2. If you need to limit your spell check to certain portions of your report, additional options in the spell checking options in the **Tools** menu are:
   - Check current field
   - Check selected fields
   - Check current form
3. As you run the spell check, you are prompted to add unknown words to the dictionary associated with your **WinTOTAL Username**.



4. To add or remove words in the dictionary, click **Tools, Spell Check, View/edit user dictionary** from the menus in the toolbar.


Dictionary Editor
Save
Close
Dictionary edit options
To add a word into your dictionary, type the new word in the 'Dictionary entry' field and click 'Add'. To remove a word, select it from the 'Words in dictionary' box and click 'Delete'.
Dictionary entry:
Add
Words in dictionary:
Delete
Vista

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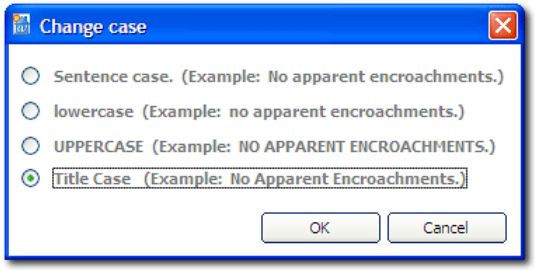
Change Case

Consistency is a key way to maintain a professional face to your business. Until now, if you've been working on your report, there hasn't been a quick way to give your report a face lift before sending it out the door. Now the **Change Case** tools, new in Aurora, help you ensure that your appraisals go out the door with the same capitalization scheme throughout the report. To change the case of any or all text in your report…

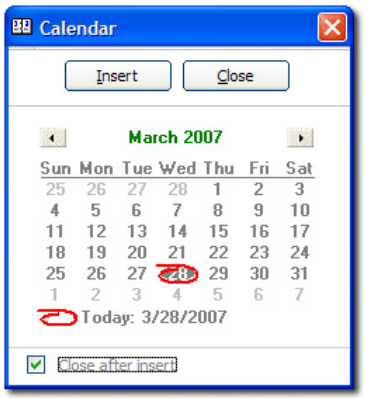
1. In the Forms PowerView, click **Tools**, **Change Case**, **Change whole report** from the menus. Alternately, you can limit the case change to:
   - The current field
   - All selected fields
   - The current form
2. Once you've selected the option that suits your needs, you're prompted with a choice of case format. Pick the option that suits you best and click **OK** to apply the changes.



Calendar

WinTOTAL provides a basic calendar tool through the tools menu to help you quickly find exact dates and insert them into the fields of your report. To insert a date into a WinTOTAL field with the calendar…

1. Anywhere in WinTOTAL, place your cursor in a date field and click **Tools**, **Calendar** from the menus.



2. Navigate through the calendar to find the date you want to insert.
3. When you find the desired date, click to select it and then click Insert to place it into your report field.

File Labels

The ideal of the "paperless office" continues to elude most appraisers. While some functions — such as the digital workfile — are now handled electronically, many appraisers are still more comfortable with the old manila folder. If you

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prefer the paper-based approach, you can print labels for your work folders from within WinTOTAL. Using WinTOTAL's File Labels tool is a two-step process…

1. Create a label template to use.
2. Print the label using your template.

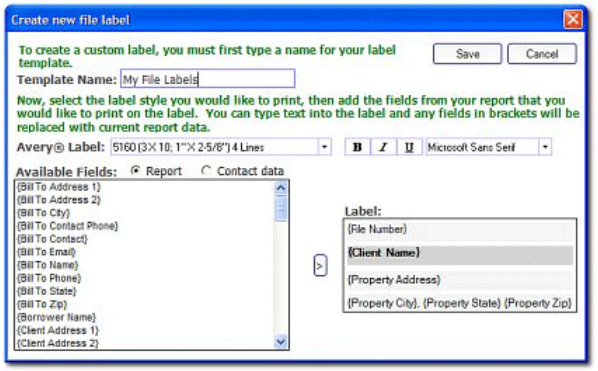
Creating Label Templates

To create a file label…

1. Click the **Tools** menu, and then select **Create File Labels**.
2. From the **Print Labels** screen, click **New** at the end of the **Template** drop-down menu.

Print Labels
To create a custom label select the template that you
in the preview window on the right.
Template: Return Address 5267
New Edit Delete
Select label starting position:

3. Type a name for your labels in the **Template Name** box.
4. From the **Avery® Label** drop-down menu, choose one of the pre-defined label types. If you're using a non-Avery label, pay attention to the label sizes listed.
5. Begin building your label using any combination of three data types. Click the **Label Template** box to place your cursor in the desired spot and then:
   - Click the **Report** option to display a list the fields from your report. Scroll through the list to find the field whose information you'd like included on your label. Double-click the field name and a code is inserted in the **Label Template**. When you print the label, this code is replaced with information from the report.
   - Click the **Contact data** option to display the fields related to your office. Double-click any field to place it on your label.
   - With your cursor in the **Label Template** box, begin typing to insert text or spacing. Do not type anything between the brackets { } surrounding the codes you inserted from the lists. Depending upon the type of label you selected, you may have anywhere from two to five lines available.


Create new file label
To create a custom label, you must first type a name for your label template.
Save
Cancel
Template Name: My File Labels
Now, select the label style you would like to print, then add the fields from your report that you would like to print on the label. You can type text into the label and any fields in brackets will be replaced with current report data.
Avery® Label: 5160 (3 X 10; 1" X 2-5/8") 4 Lines
Microsoft Sans Serif
Available Fields: Report Contact data
{Bill To Address 1}
{Bill To Address 2}
{Bill To City}
{Bill To Contact Phone}
{Bill To Contact}
{Bill To Email}
{Bill To Name}
{Bill To Phone}
{Bill To State}
{Bill To Zip}
{Borrower Name}
{Client Address 1}
{Client Address 2}
Label:
{File Number}
{Client Name}
{Property Address}
{Property City}, {Property State} {Property Zip}

6. When your label template is complete, click **Save**.

Printing File Labels

To print a file label for a report…

1. With the desired report open in WinTOTAL, click the **Tools** menu, then select **Create File Label**.

   - OR -

   From the Appraisal Desktop, select a report in the **Files** list, then right-click and choose **Create File Labels** from the pop-up menu.

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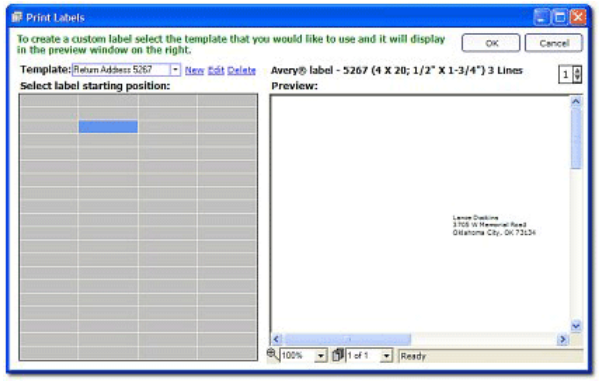


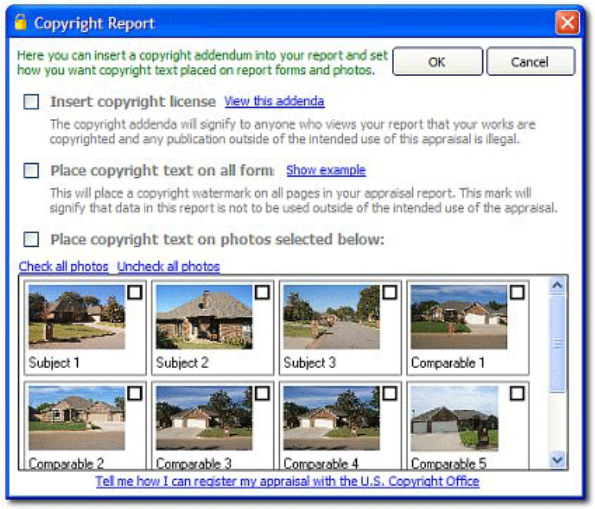
2. From the **Template** drop-down menu, select your desired label format.
3. Depending upon the type of label your template uses, the label grid changes, showing you a sheet of labels. Click the label location on the sheet to the left to indicate the label you want to print. This is useful if you have a sheet of labels that is only partially used.
4. If you are curious how your label looks, click **Zoom** at the bottom of the screen to get a closer look.
5. If you need to tweak the label format, click **Edit**. Make your changes as necessary and click **Save** when finished.

When you label is ready, click **OK**. The Windows **Print** screen appears, from which you can select the printer that holds your labels. Click **OK** to send the label to your printer.

Copyright Reports

New to the Aurora release of WinTOTAL is the ability to copyright your appraisal reports to ensure that their content is legally protected for legitimate use only. To copyright a report…

1. Open a report you wish to copyright.
2. Once it's open, click **Copyright Report** in the **Tools** menu.


Copyright Report
Here you can insert a copyright addendum into your report and set how you want copyright text placed on report forms and photos.
OK
Cancel
Insert copyright license
View this addenda
The copyright addenda will signify to anyone who views your report that your works are copyrighted and any publication outside of the intended use of this appraisal is illegal.
Place copyright text on all form
Show example
This will place a copyright watermark on all pages in your appraisal report. This mark will signify that data in this report is not to be used outside of the intended use of the appraisal.
Place copyright text on photos selected below:
Check all photos
Uncheck all photos
Subject 1
Subject 2
Subject 3
Comparable 1
Comparable 2
Comparable 3
Comparable 4
Comparable 5
Tell me how I can register my appraisal with the U.S. Copyright Office

3. When the **Copyright Report** screen appears, mark each of the options you wish to use in your copyright protection. Options include:
   - **Insert copyright license –** Inserts a copyright license into your report to provide a clear understanding of the copyright's implications.
   - **Place copyright text on all forms –** Labels each form in your report as copyrighted.
   - **Place copyright text on photos selected below** – When you mark this option, you can choose to include the word "Copyright" on any or all of your appraisal photos by marking the photos you'd like to copyright.
   - **Tell me how I can register my appraisal with the U.S. Copyright Office –** This link takes you directly to the page of the government's copyright website that outlines how you can copyright your report.

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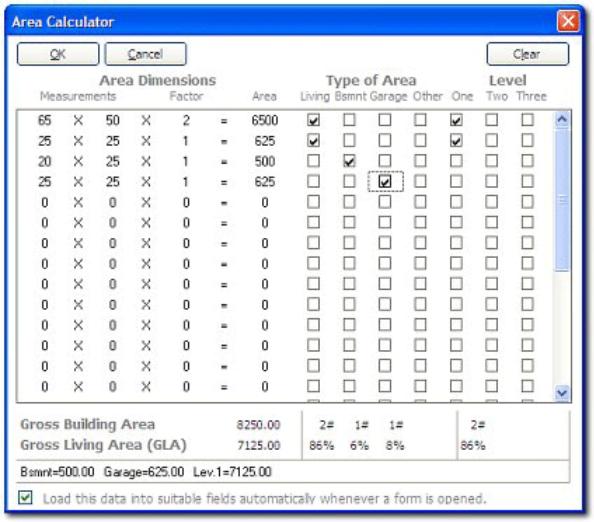
4. Once you've selected the appropriate options for your copyright, click **OK** to copyright your report.

WinTOTAL flags your report as copyrighted and adds an unlimited use license agreement to your report, explaining the terms of use for your appraisal report.

Area Calculator

If you don't use a sketch program to calculate areas, WinTOTAL comes complete with an interface for entering room dimensions in the Area Calculator. To use the **Area Calculator**…

1. Anywhere in WinTOTAL, click **Tools**, **Area Calculator** from the menus.



2. Type your figures in the appropriate fields, specifying the type and level of the area you're calculating.

3. Check the option to automatically transfer the figures into your report if desired.

> **Note**: When you're using the **Building Area Addendum** form, you must use the Area Calculator in order to enter figures onto the form.

4. When finished with your calculation, **OK** to close the window and insert any calculations you specified.

Area Estimator

Calculating the area of an irregular lot can prove a challenge for even the most geometrically-gifted appraiser. WinTOTAL provides a simple utility to estimate areas using the "average side" method. To use the area estimator…

1. Anywhere in WinTOTAL, place your cursor in the field you'd like to contain the results of your calculation.

2. From the menus, select **Tools, Area Estimator**.

3. Select the desired units (Feet/inches, meters, miles) from the **Units for sides** drop-down menu.

4. Select the units for the result (Sq feet, Acres, Sq meters, Sq miles, Sq kilometers) from the **Units for area** drop-down menu.

5. Enter the first measurement in the available box and press **Enter** or click **Add Side**.

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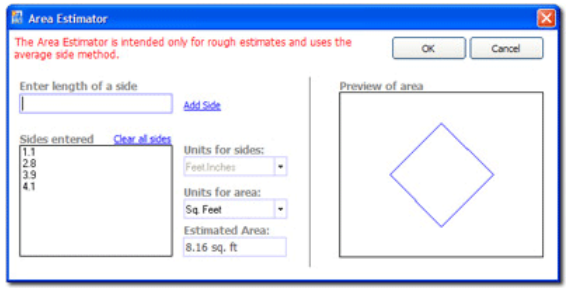
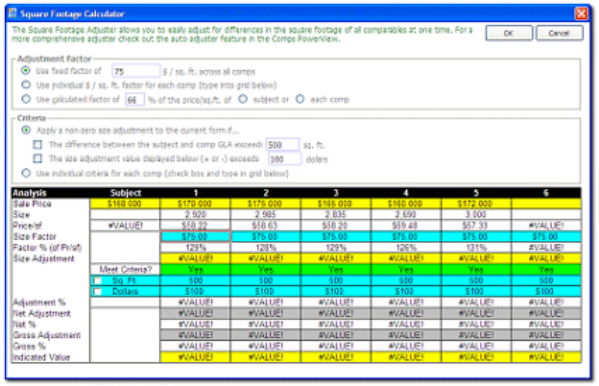


6. Continue entering additional sides until all dimensions have been entered. The Estimated Area is calculated as you add sides and displayed in the **Estimated Area** box.
7. Click **OK** to place the calculated area into your form.
   - If you make an error in one of the dimensions, click **Clear all sides** to start over.
   - At any time, you can select different **Units** for area.

Square Footage Adjuster

The Square Footage Adjuster allows you to easily adjust for differences in the square footage of all comparables in one easy step.

1. Ensure that the sales price and square footage for all comparables have been entered.
2. Then, in the Forms PowerView or Comps PowerView, click **Tools, Square Footage Adjuster** from the menus.



3. The first section of the Square Footage Adjuster shows you the methods available for calculating the adjustment. Choose the method you want to use for your calculation and set the parameters that determine if the adjustment is relevant, the SF Adjuster shows you the resultant net/gross percentages as they appear on the form.
4. Click **OK** to merge the adjustment figures into the current report.

If for some reason, you must change the square footage of a comparable, be sure to reload the SF Adjuster so that it can recalculate the adjustments.

Math Calculator

You can now do basic math operations using WinTOTAL's Math Calculator so that you can drop those calculations into your report. By running this option, a basic calculator appears on your screen to help you quickly calculate most common calculations as your build your appraisal. In addition, WinTOTAL's Math Calculator can accept basic Excel-like formulas to help you make your calculations more

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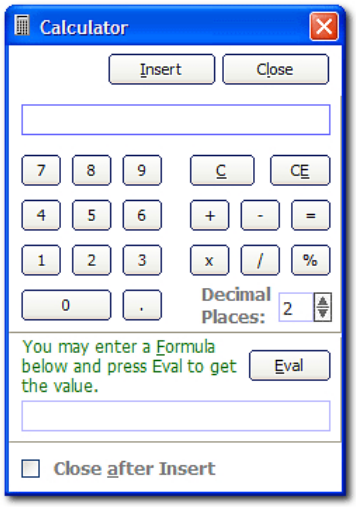
easily. To perform calculations and insert them into your report…

1. Anywhere in WinTOTAL, find the field into which you want to insert your calculation and click to select it.
2. Click **Tools**, **Math Calculator** from the menus.

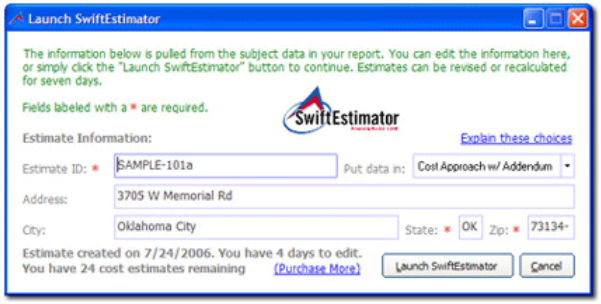


3. Use the basic calculator functions to determine a value OR enter an Excel formula into the bottom text box and click **Eval**.
4. If you're satisfied with the value you've calculated, indicate whether you want to keep the calculator open after you insert the value into your field by checking the box at the bottom and then click **Insert** to add it into the selected field.

Marshall & Swift Cost Estimates

WinTOTAL now integrates directly with Marshall and Swift's online estimation product, SwiftEstimator™. SwiftEstimator™ automates cost data searches, calculations and data entry on appraisal forms - letting you easily create a detailed Cost Approach without even having to pay an annual subscription fee for cost data. For more information on SwiftEstimator™, click here. If you prefer to use the Marshall & Swift approach to cost estimates, you can take advantage of this integration via the **Tools** menu. To run a cost estimate…

1. From anywhere in WinTOTAL, click **Tools**, **Launch SwiftEstimator™**.


Launch SwiftEstimator
The information below is pulled from the subject data in your report. You can edit the information here, or simply click the "Launch SwiftEstimator" button to continue. Estimates can be revised or recalculated for seven days.
Fields labeled with a * are required.
SwiftEstimator
Estimate Information:
Explain these choices
Estimate ID: * SAMPLE-101a
Put data in: Cost Approach w/ Addendum
Address: 3705 W Memorial Rd
City: Oklahoma City
State: * OK
Zip: * 73134-
Estimate created on 7/24/2006. You have 4 days to edit.
You have 24 cost estimates remaining
(Purchase More)
Launch SwiftEstimator
Cancel

2. In the screen that appears, a summary of the data from your report that you wish to submit to Marshall & Swift appears along with a statement of your total remaining cost estimates, the remaining number of days you have to recalculate an existing estimate for your report, and a choice of form to use for the final estimate. First, verify that all required information (denoted with a red asterisk) has been filled out and fill in any remaining gaps.

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Note: Due to limitations in SwiftEstimator™'s integration tools, the square footage, client, and appraiser fields cannot be transferred into your Marshall & Swift Cost Estimate at this time.

3. Next, choose a type of estimate you wish to use. Options are:
   - **Cost Approach w/ Addenda –** Runs a standard report and transfers the data to both the Cost Approach section of your major form and into a special cost approach addendum created by WinTOTAL.
   - **Cost Approach Only** – Runs a standard report and transfers the data into the Cost Approach section of your major form only.
   - **Marshall & Swift 1007 LGL –** Runs your cost estimate and inserts the resulting 1007 into your report as a legal sized form. Keep in mind that when you select this option, the cost estimate is NOT transferred into the cost approach section of your major form.
   - **Marshall & Swift 1007 LTR –** Runs your cost estimate and inserts the resulting 1007 into your report as a letter sized form. Keep in mind that when you select this option, the cost estimate is NOT transferred into the cost approach section of your major form.

Note: Each of these options adds a copy of the cost estimate to the workfile automatically so that you can keep an original copy around as required by USPAP. If a revision to your estimate is required later, the SwiftEstimator™ integration again copies the update to your workfile with a time and date stamp so you can track and verify the history of the report.

4. Finally, click **Launch SwiftEstimator™** to begin your cost estimate through Marshall & Swift's online tool.

Note: You must have available cost estimates in your a la mode account in order to launch the SwiftEstimator™. If this screen indicates that you have no available cost estimates, click **Purchase More** to buy the necessary number of cost estimates before proceeding.

5. When the SwiftEstimator™ appears, fill out the required property details for your cost estimate. For additional information or assistance using the SwiftEstimator™, click the **Help** link in the upper right corner of the screen.
6. Since Marshall & Swift currently limits the automatic upload of data from your report to basic subject address information, a **Data Lookup** sidebar appears on the left with information from your report. To copy this information into our Windows clipboard so you can paste it into SwiftEstimator™, click the **Copy** link beside the desired information. Then, just paste it in as you would anything else.
7. When the details of your Cost Estimate are complete, you arrive at the **Reports/Calc** section of the SwiftEstimator™. A brief overview of your data is supplied. Review the data you see and make any adjustments to the data before proceeding.
8. When you're satisfied with your data, click **Calculate** to determine your cost estimate.

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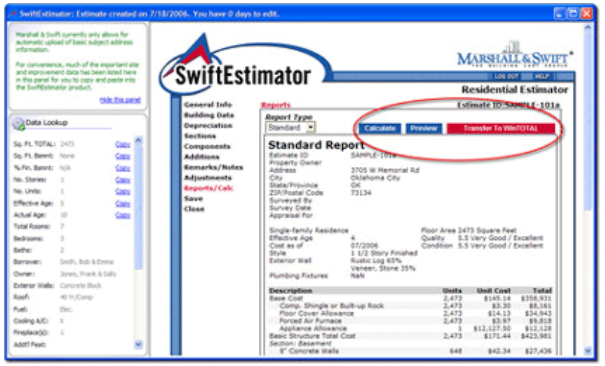
Note: One cost estimate is deducted from your account when you click **Calculate**. If you determine that adjustments must be made to your cost estimate, you have 7 full days after your first cost estimate is generated (when you first click **Calculate**) to recalculate your cost estimate free of charge. As you continue to work with the cost estimate, WinTOTAL displays the number of days you have left to recalculate. After 7 days, another cost estimate is deducted from your account when you attempt to recalculate.

9. When the calculation is complete, the results appear in the same window, but you can always see the entire report (whether Standard or a 1007) by clicking **Preview**.

10. If you need to make any adjustments to your cost estimate, you can do so now or you can return at a later time (before the end of your 7 day grace period). To recalculate your cost estimate, simply launch the SwiftEstimator™ tool in WinTOTAL, make any necessary changes, return to the **Reports/Calc** step of the SwiftEstimator™, and click **Calculate** again.

11. When you are satisfied with your cost estimate, click **Transfer to WinTOTAL** to move the estimate into WinTOTAL.



12. When you return to WinTOTAL, you may be prompted about adding the new data to your report. If you receive a prompt, click **Yes** to confirm that you want to add the new cost estimate to your report.

Your cost estimate is immediately added to your report.

Property Presentations

As the appraisal industry evolves, the savvy appraiser is always on the lookout for new ways to market appraisal services to different audiences. One often overlooked segment of the real estate market is the "For Sale By Owner" or FSBO home seller. These individuals are often marketing their homes without the benefit of a real estate agent to help them establish the value of their homes. Enter the appraiser.

XSites include a feature which allows you to help FSBOs market their homes and justify their asking prices. Specifically, once you've completed an appraisal for a FSBO customer, you can upload that appraisal to your XSite. A custom URL is created on your XSite, which home sellers can pass along to perspective buyers. When a buyer views the site, they see the following:

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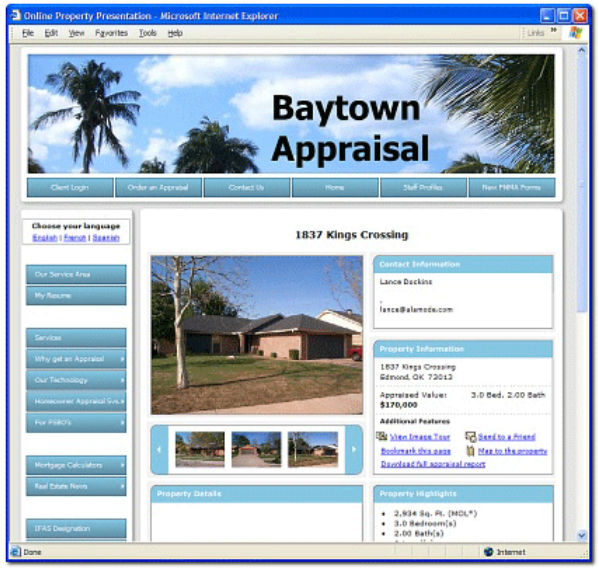
- Summary of the professional appraisal report
- Link to download the full appraisal report
- Beautiful Flash-animated listings brochure
- Unlimited, full-color photos (provided by you during your inspection)
- Virtual tour
- Online map



Creating the Presentation

To create an Online Property Listing…

1. Open the desired report in WinTOTAL and click **Tools**, **Property Presentation Wizard** from the menus.
2. In the login screen, enter your XSite **Username** and **Password**, and then click **Next**.
3. The **Additional Information** screen appears, allowing you to enter specific information about the property which may not be included in the appraisal report, but would be beneficial in marketing this property to buyers. Fill out any or all of the fields for which you have information and click **Next**.
4. Give a description of the property and click **Next**.
5. Specify how much, if any, of the report you'd like to include on your site. To include a PDF of the entire report, mark the **Print the entire report to PDF** option. To select certain pages, instead choose **Print specific pages**. Click **Next** to continue.
6. You're given the option of uploading any photos from the report to your XSite. Check the box for the photos you wish to include. If you have additional photos from your inspection that aren't included in the report, click **Add additional photo**. Find the photo file on your hard drive and click **Open**. Repeat this step to add additional photos. Click **Next** to continue.
7. Select the XSite you wish to upload this report to from the **Your XSite** drop-down menu. In the **Path to presentation** box, type the URL which you'd like the homeowner to use. For example, you might type the property address.
8. Complete the **Client's Name** and **E-mail address** fields to automatically generate a Disclosure Agreement form. The client completes this form to grant you permission to display the report on your site. Click **Next** to continue.
9. The wizard now generates the report. If you opted to include only a portion of the report, the standard WinTOTAL **Print** screen appears allowing you to select which pages are printed. Make your selections and click **OK**.

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10. Once the report is generated, you're prompted to preview the site. Click the link to open a window and ensure that the information is correct. Click **Next** to continue and then click **Finish** to complete the process.

Publishing the Presentation

Once the report is complete, you must return to your XSite to enable it. Before doing so, you should contact your customer and ensure that they received the electronic End User Agreement and are willing to accept the terms. They're prompted to visit the site online and complete an acceptance form. Once this is done, you're ready to launch the property report on your XSite.

1. Log into your XSite and click the **XSite** in the toolbar at the top.
2. Click **Online Properties** in the **Extra Tools** pane on the left.
3. The reports you've uploaded from WinTOTAL are displayed in the **Online Properties** window. Click **Preview** to look at the site. If your site's "File Not Found" message is displayed, the home owner has not yet completed their acceptance form. Once they do so, the site should display properly.
4. As necessary you can manipulate this online property:
   - Check the box to the left of the property name to enable this page.
   - Click **Delete** to remove it from your site.
   - If you need to adjust the URL address you entered earlier, click **Edit URL**.

Your customer's property is now available online to assist in marketing their home. Note that it is not viewable from your XSite, unless you choose to add the link to either a menu item or to a custom page.

Convert Competitor Files

If you've come to WinTOTAL from a 3rd party formfilling application, chances are you've got a wealth of data locked up your old appraisals files. Luckily, WinTOTAL has the key to unlock that data. To convert your old appraisal files…

1. Anywhere in WinTOTAL, click **Tools Convert Competitor Files** from the menus to launch the **WinTOTAL Conversion Wizard**.

WinTOTAL Conversion Wizard
WinTOTAL Conversion Wizard
Welcome to the WinTOTAL Conversion Wizard!
This wizard copies and then converts your non a la mode appraisal files, your business contacts, and comps, photos, and text databases. Once the conversions have taken place, you'll be able to use those files and data within WinTOTAL.
Please select which software package you'd like to convert data from:
ACI/PDSI (DOS)
Day One (DOS)
Day One (Windows)
HighPerForm (DOS)
HighPerForm (Windows)
MCS (DOS)
Residential Appraisers (DOS)
Residential Appraisers (Windows)
< Back
Next >
Finish
Cancel

2. From the drop-down menu, select the format for the files you'd like to convert.
3. Depending upon the format you choose, one or more options may appear at the bottom of the screen. These show the resources that WinTOTAL is able to convert in addition to report files. For example, in some formats,

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WinTOTAL can import comparables, photos and text databases (canned comments). Check each box for the items you wish to convert, and then click **Next**.

4. If you did not select options other than just appraisal reports in the previous step, skip to the next step. Otherwise, you may see up to four settings here depending on the items you indicated you wanted to convert. For each setting, click **Browse**, navigate out to the appropriate file from your old software and click **Open** to accept the file.

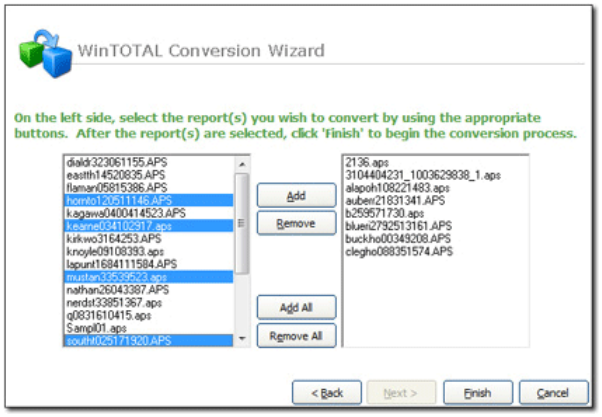
5. Now, click **Browse** to navigate out to the folder containing the reports from your old software. Navigate out to that folder, click it, and click **OK** to select it.

6. Select a WinTOTAL folder in which to store the converted files. You can either click the drop-down menu to select an existing folder or create a new folder for your converted files by clicking **New**, typing a name, and clicking **OK**.

7. Click **Next** to continue.

8. The wizard presents a warning about the imperfect nature of file conversion in general. Read the warning and click **Next** to continue.

9. WinTOTAL then scans the selected directory on your system and displays any reports found in a list. Select the report(s) you'd like to convert from the list on the left and click **Add**. Or, click **Add All** to select all the reports displayed.



10. Click **Finish** to launch the conversion process.

11. When the conversion is complete, WinTOTAL notifies you with a summary of the results. Just click **OK** and launch WinTOTAL to find your newly converted content.

Note: Be aware that file conversion may take some time. If you have hundreds of reports, it is strongly recommended that you convert them in smaller batches.

When you next return to the File Cabinet, your converted files should be displayed in the appropriate folders. Likewise, if you converted any other items, they also appear when you next access the **Files** PowerView

Collaboration

For security purposes and to prevent pirating of your data, WinTOTAL limits its report delivery to files that were created with your same customer number. The message that appears when you try to deliver a report not created with your customer number:

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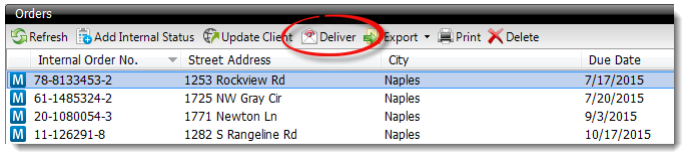
If you want to deliver a file created on another appraiser's computer, simply deliver from inside of TOTAL Connect. Before beginning the delivery process, TOTAL Connect must be installed and configured. Click here for step-by-step instructions on installing TOTAL Connect.

Once you have TOTAL Connect installed and configured, follow the instructions below to deliver your report using any of the TOTAL Connect plugins:

1. Begin by opening TOTAL Connect.
2. Select the appropriate order from the list and click **Deliver**.

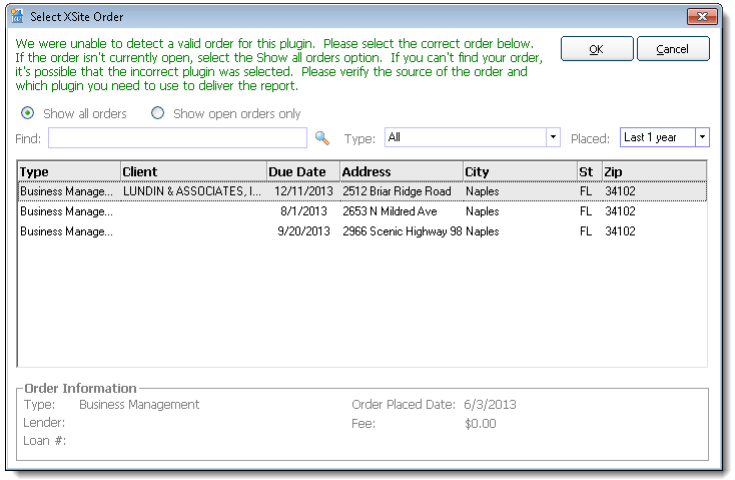


3. Follow the instructions in the delivery wizard to complete the delivery process.

Associate XSite Orders

While WinTOTAL's XSite synchronization tools are designed to notify you any time you attempt to download a new order that you've already started in WinTOTAL, you may find times where you need to associate the two so you can deliver the report to the appropriate client. If you need to associate your existing report with an order from your XSite…

1. From inside the report you wish to associate with an XSite order, click **Tools**, **Associate XSite Order** in the menus.
2. In the list of orders that appears, find the order you wish to associate with this report and click to select it. If you can't find the order in the list, you may need to mark the **Show all orders** option to find it.


Select XSite Order
We were unable to detect a valid order for this plugin. Please select the correct order below. If the order isn't currently open, select the Show all orders option. If you can't find your order, it's possible that the incorrect plugin was selected. Please verify the source of the order and which plugin you need to use to deliver the report.
OK
Cancel
Show all orders
Show open orders only
Find:
Type: All
Placed: Last 1 year
Type
Client
Due Date
Address
City
St
Zip
Business Manage... LUNDIN & ASSOCIATES, I... 12/11/2013 2512 Briar Ridge Road Naples FL 34102
Business Manage... 8/1/2013 2653 N Mildred Ave Naples FL 34102
Business Manage... 9/20/2013 2966 Scenic Highway 98 Naples FL 34102
Order Information
Type: Business Management
Lender:
Loan #:
Order Placed Date: 6/3/2013
Fee: $0.00

3. Click **OK** to continue.
4. A window appears prompting you to delete the original order file so that you do not confuse the two in the future. For best results, we recommend that you delete the original order. Click **Yes** to delete it or click **No** if you wish to keep it.

Roll Back to Athena

While the Aurora version of WinTOTAL contains all the latest features, updates and upgrades to help you stay productive in your appraisal business, we provide the option for you to

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"roll back" to the previous Athena version of WinTOTAL if you wish. This "lite" version of WinTOTAL will continuously receive updates and support as the industry changes and may be the more comfortable tool for those who have become familiar with it. If you're considering the possibility of rolling back to Athena, consult our Roll back FAQ for more details or our Rollback Tech Doc for detailed instructions on this process.

- Rollback FAQ (4997)
- Rollback Tech Doc (4999)

To initiate the rollback process…

1. Open the Appraisal Desktop.
2. From the **Tools** menu, click **Rollback to Athena**.

Printing

Since printing is an essential step in completing each report – whether generating a hard copy or creating a PDF using the PDF creation tool now included with WinTOTAL - the essentials are covered in this user guide. You can either print your report using WinTOTAL's **Print** button or through the **File** menu. Here's a brief description of the print options in WinTOTAL's **File** menu:

- **Print** – Acts just like the **Print** button in WinTOTAL.
- **Print to PDF** – Generates a PDF copy of your report.
- **Print Current Form** – Prints the current form on your screen.
- **Print Setup** – Allows you to select your main and photo printers.

Print Reports

Depending on where you print in WinTOTAL, you have different options. When printing from WinTOTAL, you can print a hard copy or PDF copy of any pages in your report. But when you print from the Appraisal Desktop, you have the option to print a reports list, invoice only, or just a "quick print" copy of your report. To print a report…

1. From inside a report or from the Appraisal Desktop, click **Print** in the top toolbars or go to the **File** menu and choose one of the print options.
2. If you're printing from the Appraisal Desktop, mark your preferred printing option and click **OK**. Otherwise, skip this step. Options are:
   - **Print Report** – This option opens the standard WinTOTAL **Print** screen, from which you can choose which pages and forms you'd like to print, as well as choosing the printer to which you'd like to send them.
   - **Auto print report** – This option automatically prints the report based on the default settings you've chosen for that report in the past, so you can skip the remaining steps in this process.
   - **Print invoice only** – If you just need to send out a new invoice, choose this option. Any invoice form found in the report is sent directly to your default printer, so you can skip the remaining steps in this process.
   - **Print reports list** – The final option doesn't print the actual report. Instead, it sends the report list directly to your default printer, so you can skip the remaining steps in this process.

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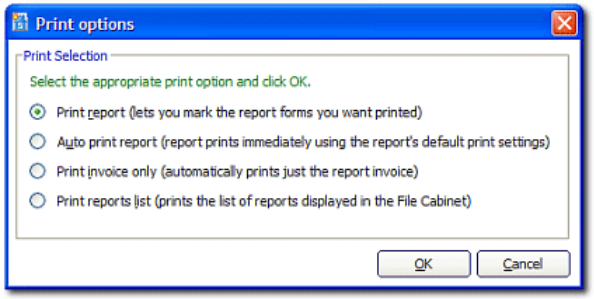
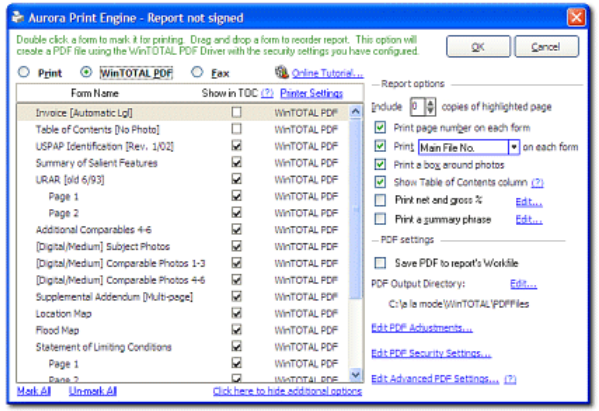

Print options
Print Selection
Select the appropriate print option and click OK.
Print report (lets you mark the report forms you want printed)
Auto print report (report prints immediately using the report's default print settings)
Print invoice only (automatically prints just the report invoice)
Print reports list (prints the list of reports displayed in the File Cabinet)
OK
Cancel

3. When the **Aurora Print Engine** appears, you should see a list of the forms in your report and other options. Mark the option for the format you want for your print job: **Print**, **WinTOTAL PDF** or **Fax**.



4. Double-click each form you want to print or click **Mark All** to print everything. An icon appears next to forms you've marked. To "unmark" a form and omit it from printing, double-click it again.

5. You can also select the target printer on a form by form basis. If you have just one printer hooked up to your PC, you can leave this at the default. If you have separate printers for color printing or photos and B&W printing, click **Printer Settings** in the upper left corner of the screen under your **Online Tutorial** link to tell WinTOTAL which printers you use.

> **Note**: You can also change the printer settings by using **Edit Printer Settings** in the additional print options.

6. If you see the column titled TOC you can mark whether or not a form is listed on WinTOTAL's dynamic **Table of Contents** form. When this box is cleared for a form, it is skipped when printing as well as page number. This feature is handy for comps pages included for analysis, but not necessary for the final report, invoice forms, and other photo pages.

> **Note**: By default this column does not appear in the print window. To enable it, click the **Click here for more printing options** link in the lower left corner of the screen, check the **Show Table of Contents column** option, and ensure that you've added a **Table of Contents** form to your report.

7. Once you've selected your options, click **OK** to begin the print job.

Print Options

When you're printing, there's a link at the lower right of the forms list for additional options. These options change depending on whether you are printing to hard copy printers or creating a PDF. To apply special print options while you're printing:

1. Print your report in the typical way.
2. In the Aurora Print Engine, click the link at the bottom to open the additional printing options.

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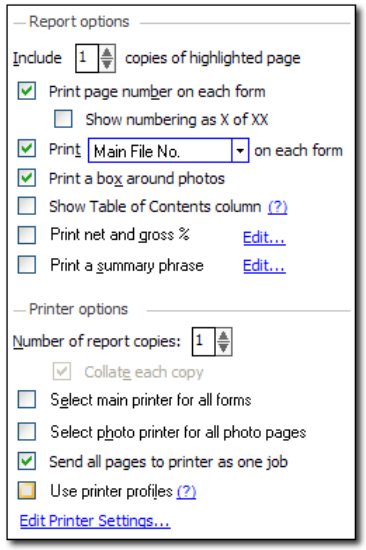
3. Set your preferred options using the check boxes and links in the pane on the right. Options include.


Report options
Include 1 copies of highlighted page
Print page number on each form
Show numbering as X of XX
Print Main File No. on each form
Print a box around photos
Show Table of Contents column (?)
Print net and gross %
Edit...
Print a summary phrase
Edit...
Printer options
Number of report copies: 1
Collate each copy
Select main printer for all forms
Select photo printer for all photo pages
Send all pages to printer as one job
Use printer profiles (?)
Edit Printer Settings...

- **Include # copies of highlighted page** – Allows you to specify a different number of copies on a page by page basis.
- **Print page number on each form** - Prints the page number on each form. Or course, a page number gives your report a more professional appearance and keeps pages from being misplaced.
  - **Show numbering as X of XX** - When page numbering is enabled along this option, page numbers are formatted as 1 of 10 (for example). Otherwise, WinTOTAL just prints the page number at the bottom of each page of your report.
- **Print # on each form** - Overlays the selected number at the top right of each form. This is handy for forms that don't have a place for a file number or for including a specific identifying number on every form to meet your client's requirements.

  Available options (in the drop-down box) include:
  - Main File number
  - Other file number
  - Internal Order number
  - Lender Case number
  - Client File number
  - FHA/VA Case number
- **Print a box around photos** - Select whether or not you want a border around photos.
- **Show Table of Contents column** – Toggles whether the TOC column is hidden in the print window. When enabled, you can remove forms from the printed TOC by unchecking them.
- **Print net and gross % -** Controls whether or not the net and gross adjustments print on the major form.
  - Click the **Edit** link to the right to change formatting options.
- **Print a summary phrase –** Allows you to print a summary phrase about each form in the top left corner of the page
  - Click the **Edit** link to the right to set form-specific options, including the phrase to display and positioning of the phrase on the form.
- **Select main printer for all forms –** Prints all form pages using your designated main printer allowing you to print photo pages and form pages on separate printers.
- **Select photo printer for all photo pages –** Prints all photo pages using your designated photo printer

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allowing you to print photo pages and form pages on separate printers.

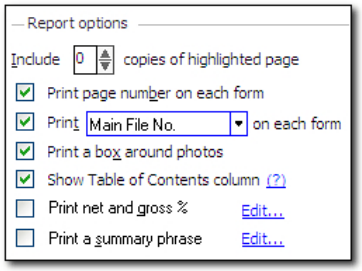
- **Send all pages to printer as one job –** Sends the entire print job to the printer as one job rather than breaking up the print job into a batch of individual print jobs. This option is handy when you're having difficulty printing certain sections of your report.
- **Use printer profiles –** Using this option you can create and use separate combinations of photo and main printers. This option can be particularly handy when you have both a set of network printers and local printers and would like to alternate between them.
- **Edit Printer Settings –** This option is equivalent to the **Printer Settings** option that appears in the upper left hand corner of the **Print** window. It allows you to select your main and photo printers and make adjustments to the arrangement of the print job on the page.

4. When finished, click **OK** to apply your changes and print your report.

Print Net & Gross Adjustments

Most forms themselves don't have specific fields for net and gross adjustments; however, many appraisers prefer to have them overlaid in the sales comparison approach. If you wish to have the net and gross percentages printed, you can set WinTOTAL to print them on your forms. To do so…

1. Print your report in the usual way.
2. When the Aurora Print Engine appears, check the **Print Net and Gross %** box in the **Report Options** pane on the right. The **Edit** link beside this option then enables you to specify how they are labeled.


Report options
Include 0 copies of highlighted page
Print page number on each form
Print Main File No. on each form
Print a box around photos
Show Table of Contents column (?)
Print net and gross % Edit...
Print a summary phrase Edit...

3. When finished, click **OK** to accept your changes and print your report.

Print Summary Phrases

To identify the appraisal and report type, many appraisers prefer to overlay the words "Summary Appraisal Report" at the top of the form. If you want to overlay a phrase on your appraisal report…

1. Print your report in the usual way.
2. When the Aurora Print Engine appears, check the **Print a Summary Phrase** box in the **Report Options** pane on the right. The **Edit** link beside this option then enables you to specify the phrase you want to overlay on your report.
3. When finished, click **OK** to apply your changes and print your report.

Note: Instead of overlaying a summary phrase, you may wish to use our USPAP identification form. It provides more detail on the appraisal and report as well as room for comments and other disclaimers.

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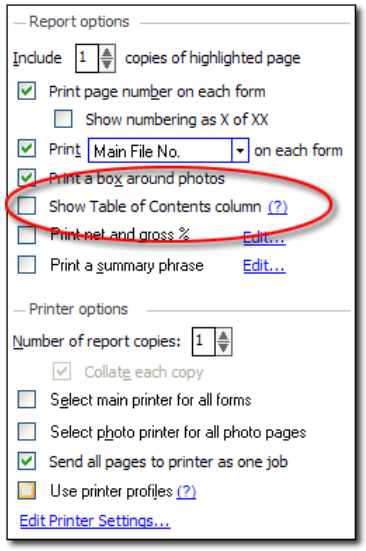
Remove Pages from the TOC

If you need to prevent certain pages of your report from being listed in your Table of Contents, WinTOTAL provides a simple way to remove them when you print your report. To prevent certain pages from appearing in the TOC...

1. Print your report as usual.
2. When the Aurora Print Engine appears, if the print options aren't displaying to the left, click the **Click here** link to the lower left of the screen to show the advanced printing options.
3. In the printing options, check the **Show Table of Contents column** box to display a list of check boxes beside each form in your report.


Report options
Include 1 copies of highlighted page
Print page number on each form
Show numbering as X of XX
Print Main File No. on each form
Print a box around photos
Show Table of Contents column (?)
Print net and gross %
Edit...
Print a summary phrase
Edit...
Printer options
Number of report copies: 1
Collate each copy
Select main printer for all forms
Select photo printer for all photo pages
Send all pages to printer as one job
Use printer profiles (?)
Edit Printer Settings...

4. Finally, uncheck each page of your report that you wish to hide in the TOC and proceed with printing. WinTOTAL will leave any pages you unchecked out of the Table of Contents.

PDF Options & Security

WinTOTAL provides a wealth of options you can apply as you print your PDF files so that you can ensure that the PDF's include all of the information and protection that you need. To apply PDF options or add security to your PDF so that others cannot copy or tamper with your data…

1. Print your report as usual.
2. When the Aurora Print Engine appears, make sure you mark the **PDF** option and then apply your PDF options using the **PDF Settings** pane on the right. Options include:
   - **Save PDF to Report's Workfile –** Copies an original version of your report PDF into your workfile so that you have a time-stamped copy of your original PDF in case you need it.
   - **Change Your PDF Output Directory –** By default, WinTOTAL saves a copy of your PDF files to C:\a la mode\WinTOTAL\PDFFiles. If you want WinTOTAL to save your PDF files elsewhere, click **Edit** and browse out to the directory you want.
   - **Edit PDF Adjustments –** Allows you to control print margins, scaling, and more.
   - **Edit PDF Security Settings –** Allows you to password protect your PDF or lock it to keep it safe from copying or tampering.

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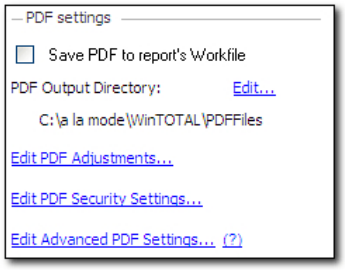
- **Edit Advanced PDF Settings –** Helps you control the format of PDF to ensure that the maximum number of clients can open the PDF files you produce.



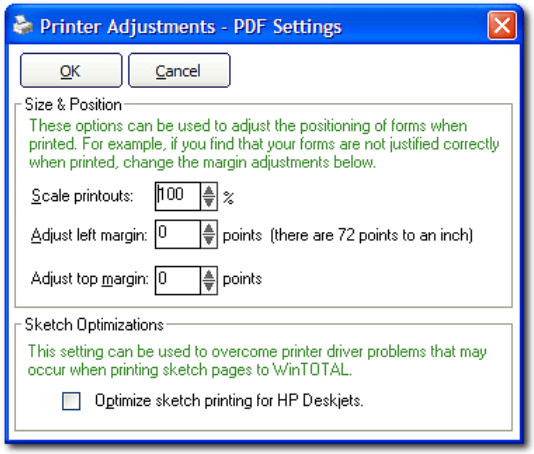
Note: If you don't see these settings to the right, you may need to click the link at the bottom of the Aurora Print Engine to see the additional printing options.

3. Once you've applied your PDF options, click **OK** in the Aurora Print Engine to accept your preferences and create your PDF.

Edit PDF Adjustments

WinTOTAL's PDF options help you control the print scaling, margins, and optimization settings for the PDF's you create. To change your PDF adjustments…

1. From the Aurora Print Engine PDF options, click the **Edit PDF Adjustments** link.


Printer Adjustments - PDF Settings
OK
Cancel
Size & Position
These options can be used to adjust the positioning of forms when printed. For example, if you find that your forms are not justified correctly when printed, change the margin adjustments below.
Scale printouts: 100 %
Adjust left margin: 0 points (there are 72 points to an inch)
Adjust top margin: 0 points
Sketch Optimizations
This setting can be used to overcome printer driver problems that may occur when printing sketch pages to WinTOTAL.
Optimize sketch printing for HP Deskjets.

2. Determine whether you would like to scale your PDF or adjust the PDF margins and use the corresponding fields to make your adjustments.
3. You should also notice another setting that pertains to sketch printing with HP DeskJets. If you are experiencing difficulties printing hard copies of your sketch pages using your HP DeskJet, check this option.
4. Finally, click **OK** when you're finished making your adjustments.

Edit PDF Security Settings

WinTOTAL's built-in PDF creation tool can assist you in securing your PDF's so that no one can tamper with your PDF or copy data out of it for any reason. To apply security settings to your PDF's…

1. From the Aurora Print Engine PDF options, click **Edit PDF Security Settings**.

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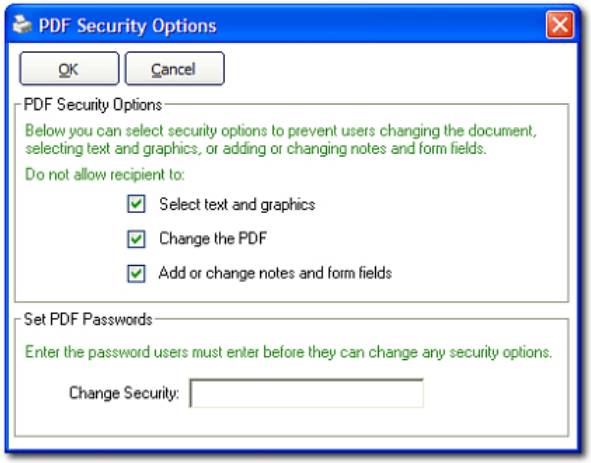

PDF Security Options
OK
Cancel
PDF Security Options
Below you can select security options to prevent users changing the document, selecting text and graphics, or adding or changing notes and form fields.
Do not allow recipient to:
Select text and graphics
Change the PDF
Add or change notes and form fields
Set PDF Passwords
Enter the password users must enter before they can change any security options.
Change Security:

2. Then, determine whether you want to permit your clients to:
   - Select text and graphics in the PDF
   - Change the PDF
   - Add or change notes and form fields

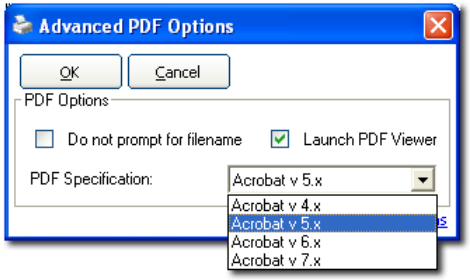
> **Note**: PDF files aren't protected by your digital signature and can be edited unless you specify otherwise by checking the **Change the PDF** box.

3. Check the corresponding boxes to prevent your clients from changing any of these features.
4. If you'd like to password protect your PDF so that a password is required to change the PDF security options, enter a password in the **Change Security** field. Keep in mind that this settings affects all PDF's that you create so you should be careful when using this feature.
5. When finished, click **OK** to accept your changes and click **OK** again in the Aurora Print Engine to create your PDF.

Edit Advanced PDF Settings

The Advanced PDF settings allow you to control the process that WinTOTAL uses to print your report to PDF. Here, you can toggle whether WinTOTAL should prompt you for a PDF file name or simply name the PDF file using its own naming conventions. You can also toggle whether the PDF should appear in your PDF Viewer once it has been created, or change the compatibility settings for your PDF's. To change your advanced PDF settings…

1. From the Aurora Print Engine PDF options, click **Edit Advanced PDF Settings**.



2. In the screen that appears, indicate whether you want WinTOTAL to prompt you for a PDF file name when creating PDF's.
3. Mark or unmark the checkbox to indicate whether you want WinTOTAL to launch your PDF viewer so you can see the PDF when it is complete.
4. Choose a PDF specification option from the drop-down list. This option controls the compatibility mode for your WinTOTAL PDF's. By default, WinTOTAL uses the Adobe Acrobat 4.x option to ensure that all of your clients can open the PDF. In general, unless a technician specifies otherwise, it's better to leave this at the default setting.

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5. When finished, click **OK** to save your options and click **OK** again in the Aurora Print Engine to create your PDF file.

Report Delivery

In the past, delivering your appraisal often meant plowing through reams of paper, juggling two or more printers, fiddling with little plastic binders, and then jumping in your car to run it over to your client's office.

Today, the vast majority of appraisals are being delivered electronically. Typically, this involves printing the report to a PDF file, then attaching it to an e-mail message. WinTOTAL Athena pioneered a new, streamlined method of report delivery through its EDI center. Now, Aurora is poised to again revolutionize how appraisers interact with their clients through a combination of innovative report delivery options:

- **Share reports via e-mail** – Appraisers who want to deliver reports directly to their customers in a PDF format, or share WinTOTAL files with other appraisers, can use this option. Using the industry standard Messaging Application Programming Interface (MAPI), WinTOTAL can interact with your default e-mail application much as it once did with the EDI Center. Report delivery is still integrated with the PDF-creation process and information from the report is still added to your accompanying e-mail message – just as you were familiar with in Athena.
- **TOTAL Connect** – If you're using your XSite, Mercury Network, or one of the XSite/Mercury network partners, like RealEC or Rels — then this delivery method is the one to use. Reports are uploaded and the status is immediately reflected in your online order management system.

To begin the delivery process, click the **Share Report** or **Deliver to Client** button, or select a specific delivery method using the drop-down arrows next to the buttons.

Default Delivery Methods

Before you use the report delivery tools in WinTOTAL, you should set the default method you'd like to use to help you save time in future deliveries. To set your default delivery method:

1. Click the drop-down arrow next to **Share Report** or **Deliver to Client** and select **Set Default**.
2. Mark the option in the list beside the report delivery method you plan to use most often. If you'd like the system to default to whatever method you used last, mark the **Remember what I did last time** option.
3. Click **OK** to save your default.

Hint: Even though you've set a default, you can always choose any of the delivery methods by choosing it from the **Deliver Report** menu, or by clicking the down arrow to the right of the **Send** button in WinTOTAL or the Appraisal Desktop.

Message Templates

Using standard message text in reports you deliver via e-mail can be a great way to consistently send a standardized message to your clients while still including report specific information in each message. To set up your standard message text:

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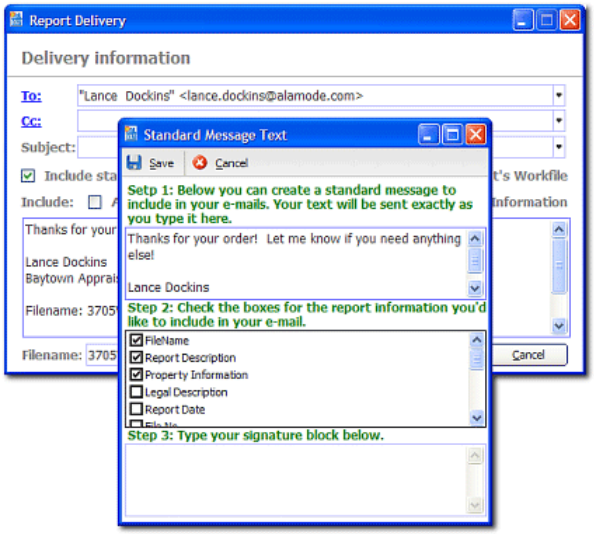
1. Begin delivering your report using any of the e-mail methods described in this chapter and click **Edit standard message text** in the **Delivery Information** screen.


Report Delivery
Delivery information
To:
"Lance Dockins" <lance.dockins@alamode.com>
Cc:
Subject:
Include sta
Include:
Standard Message Text
Save
Cancel
Setp 1: Below you can create a standard message to include in your e-mails. Your text will be sent exactly as you type it here.
Thanks for your order! Let me know if you need anything else!
Lance Dockins
Step 2: Check the boxes for the report information you'd like to include in your e-mail.
FileName
Report Description
Property Information
Legal Description
Report Date
Step 3: Type your signature block below.
Cancel

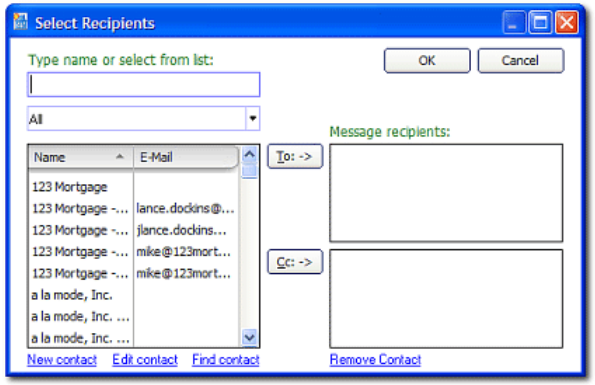
2. Type the standard message you'd like to include in the e-mail message whenever you send a report in the first text box.
3. Check any of the report items you'd like to insert into the message.
4. Finally, type your "signature block" in the last text box and click **Save**.

Now, each time you send a report, this standard text is automatically inserted into the message and you can easily edit this text in the future if necessary.

Select E-mail Recipients

When sending reports and files using WinTOTAL's report delivery tools, you can access your contacts database so you can quickly find and select recipients. This ensures that you don't have to look up their contact information in other databases. In addition, since the Contacts Database can synchronize with your XSite's Contacts Database you can ensure that you always have the most up-to-date address information available in all locations. To use the Contacts Database to address your e-mails…

1. From any of the **Delivery Information** screens that appear throughout the various delivery wizards, click any of the **To** or **CC** links your WinTOTAL address book.



2. If you know the name of your recipient, begin typing it in the first text field. As you type, the list below sorts and displays any records that match the letters you're typing. Or, use one of the following methods to find, add, or remove contacts from your address book.
   - Select a filter from the drop-down list to filter your contact list to those that just fit a certain type.

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- Click **Find Contact**, type a search phrase, and click **Find** to search for contacts. If you find one you like, click it and click Insert to include it in your message.

- Click **New Contact** to add a new contact to your address book. Once you've filled out the necessary contact information, click **OK** to save the contact.

- Click a contact and click **Edit Contact** to edit the contact's information.

- Click a contact and click **Remove Contact** to remove it from your address book.

3. Once the desired contact is displayed in the list, double-click the name to add it to the **To** section of the **Message recipients** field. Or, select the name and click the **Cc:->** button to add it to that section.

4. Repeat these steps to add as many recipients as necessary.

5. When you've found all the desired contacts, click **OK** to add their e-mail addresses to your e-mail message.

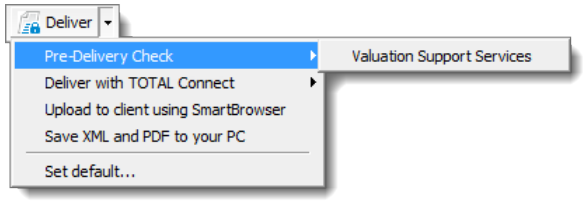
Hint: If you create any new contacts as you're selecting recipients, don't forget to synchronize those changes with your XSite by using the synchronization tools in the Appraisal Desktop.

TOTAL Connect Pro Pre-Delivery Check

TOTAL Connect Pro's Pre-Delivery Check allows you to complete your client's review process prior to singing and delivering the report. This streamlines your delivery process and allows you to make adjustments and provide commentary in the report during your final review, as opposed to canceling the delivery, returning to the report, and unsigning it to correct any issues. The commentary you provide during the Pre-Delivery Check is added to your report as a PDF.

To begin a TOTAL Connect Pro Pre-Delivery Check:

1. Click **Deliver to Client**.
2. Hover over **Pre-Delivery Check**.
3. Select the TOTAL Connect Pro partner from the list.



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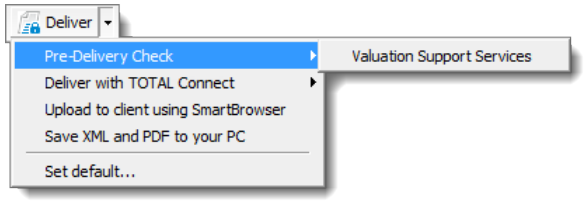
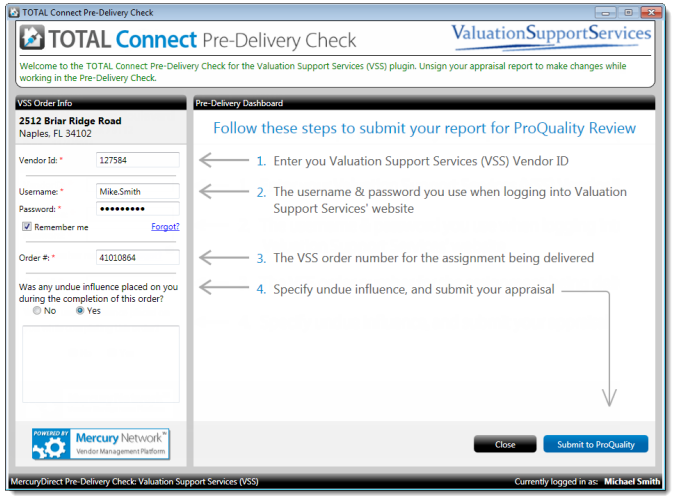
VSS Pre–Delivery Check

To begin the Valuation Support Services Pre–Delivery Check:

1. Click **Deliver to Client**.
2. Hover over **Pre-Delivery Check** and select **Valuation Support Services** from the list.



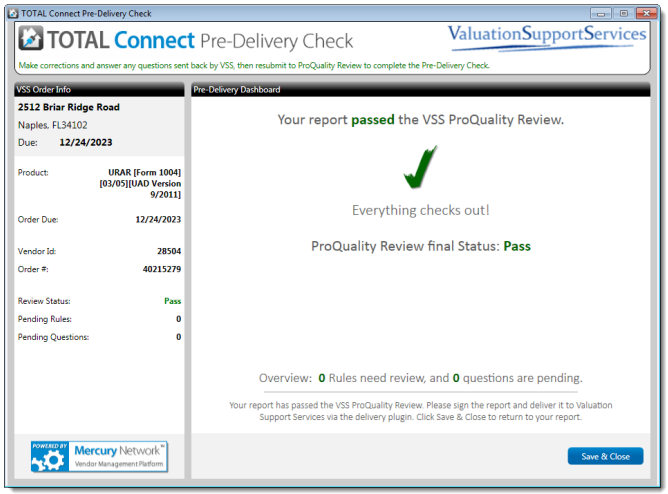
3. Enter your VSS **Vendor ID**, your **Username** and **Password**, and the **Order #** in the fields provided. Then, indicate whether or not any undue influence was placed on you during the completion of the order. If you select Yes, provide an explanation in the text box that appears.


TOTAL Connect Pre-Delivery Check
ValuationSupportServices
Welcome to the TOTAL Connect Pre-Delivery Check for the Valuation Support Services (VSS) plugin. Unsign your appraisal report to make changes while working in the Pre-Delivery Check.
VSS Order Info
2512 Briar Ridge Road
Naples, FL 34102
Vendor Id: * 127584
Username: * Mike.Smith
Password: *
Remember me
Forgot?
Order #: * 41010864
Was any undue influence placed on you during the completion of this order?
No
Yes
Pre-Delivery Dashboard
Follow these steps to submit your report for ProQuality Review
1. Enter you Valuation Support Services (VSS) Vendor ID
2. The username & password you use when logging into Valuation Support Services' website
3. The VSS order number for the assignment being delivered
4. Specify undue influence, and submit your appraisal
Mercury Network
Close
Submit to ProQuality
MercuryDirect Pre-Delivery Check: Valuation Support Services (VSS)
Currently logged in as: Michael Smith

4. When you're finished entering the VSS Order Info, click **Submit to ProQuality** to begin the ProQuality Review.
5. Once the review has finished, the final status is displayed. Click the panel below that corresponds to the ProQuality Review Final Status for your report to continue with the instructions:

b) Click here if your report passed the VSS ProQuality Review.

If your report passes with zero rules needing to be reviewed and zero questions pending, you're finished! Simply click **Save & Close** to complete the VSS PreCheck and return to your report. Then, sign the report and deliver it as you normally would.


TOTAL Connect Pre-Delivery Check
ValuationSupportServices
Make corrections and answer any questions sent back by VSS, then resubmit to ProQuality Review to complete the Pre-Delivery Check.
VSS Order Info
2512 Briar Ridge Road
Naples, FL34102
Due: 12/24/2023
Product: URAR [Form 1004] [03/05][UAD Version 9/2011]
Order Due: 12/24/2023
Vendor Id: 28504
Order #: 40215279
Review Status: Pass
Pending Rules: 0
Pending Questions: 0
Pre-Delivery Dashboard
Your report passed the VSS ProQuality Review.
Everything checks out!
ProQuality Review final Status: Pass
Overview: 0 Rules need review, and 0 questions are pending.
Your report has passed the VSS ProQuality Review. Please sign the report and deliver it to Valuation Support Services via the delivery plugin. Click Save & Close to return to your report.
Mercury Network
Save & Close

c) Click here if your report did not pass the VSS ProQuality Review.

6. If your report doesn't pass, click **Review Results** on the lower right to view a breakdown of the rules that were triggered, review the ProQuality Review results, and provide additional commentary on your report, if necessary.

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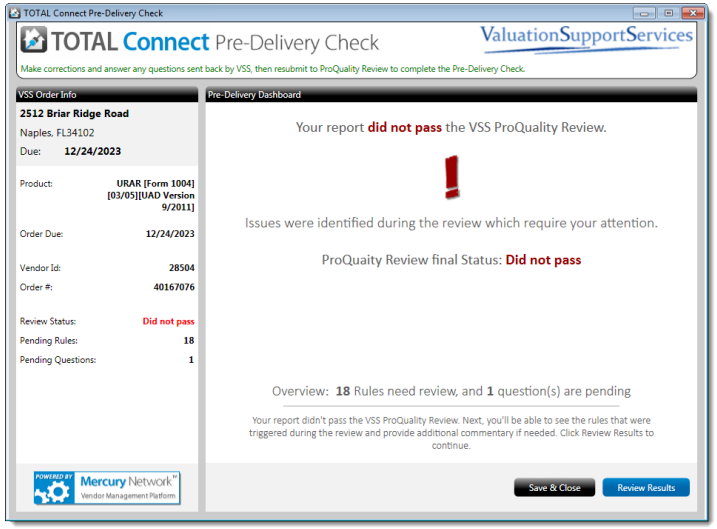
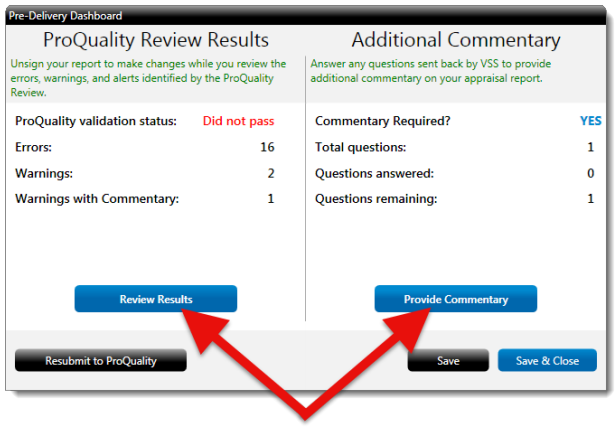

TOTAL Connect Pre-Delivery Check
ValuationSupportServices
Make corrections and answer any questions sent back by VSS, then resubmit to ProQuality Review to complete the Pre-Delivery Check.
VSS Order Info
2512 Briar Ridge Road
Naples, FL34102
Due: 12/24/2023
Product: URAR [Form 1004] [03/05][UAD Version 9/2011]
Order Due: 12/24/2023
Vendor Id: 28504
Order #: 40167076
Review Status: Did not pass
Pending Rules: 18
Pending Questions: 1
Pre-Delivery Dashboard
Your report did not pass the VSS ProQuality Review.
Issues were identified during the review which require your attention.
ProQuality Review final Status: Did not pass
Overview: 18 Rules need review, and 1 question(s) are pending
Your report didn't pass the VSS ProQuality Review. Next, you'll be able to see the rules that were triggered during the review and provide additional commentary if needed. Click Review Results to continue.
Mercury Network
Save & Close
Review Results

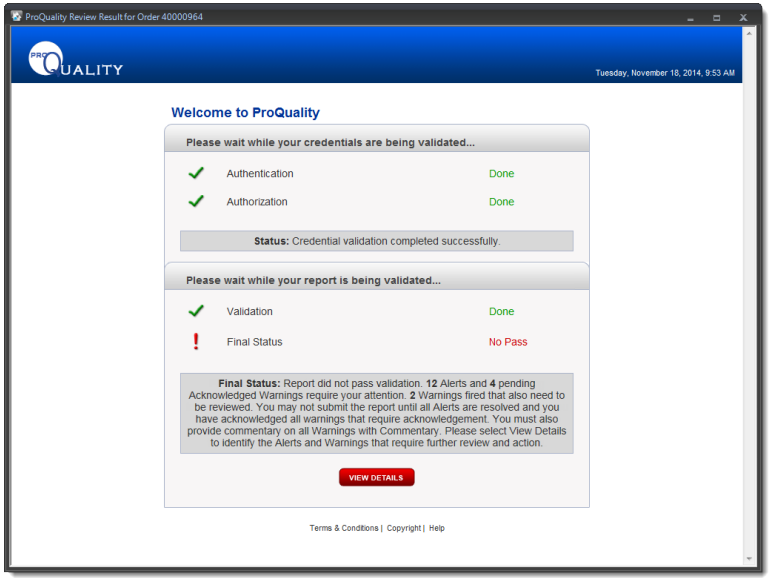
7. In the screen that appears, click Review Results to open and work through the ProQuality Review results. You're able to make changes to your report while working through the ProQuality Review as long as it's unsigned. Click Provide Commentary to answer any questions returned by VSS and provide additional information about your report, if necessary:


Pre-Delivery Dashboard
ProQuality Review Results
Unsign your report to make changes while you review the errors, warnings, and alerts identified by the ProQuality Review.
ProQuality validation status: Did not pass
Errors: 16
Warnings: 2
Warnings with Commentary: 1
Review Results
Resubmit to ProQuality
Additional Commentary
Answer any questions sent back by VSS to provide additional commentary on your appraisal report.
Commentary Required? YES
Total questions: 1
Questions answered: 0
Questions remaining: 1
Provide Commentary
Save
Save & Close

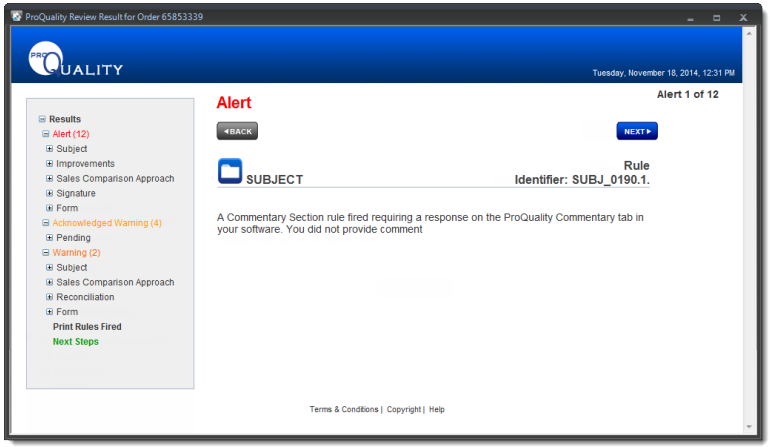
Review Results

Click **Review Results** below the ProQuality Review Results to open a separate window where you can view each rule that was triggered individually.

- When the ProQuality Welcome screen appears, click **View Details** to review each rule that was triggered.


ProQuality Review Result for Order 40000964
Tuesday, November 18, 2014, 9:53 AM
Welcome to ProQuality
Please wait while your credentials are being validated...
Authentication Done
Authorization Done
Status: Credential validation completed successfully.
Please wait while your report is being validated...
Validation Done
Final Status No Pass
Final Status: Report did not pass validation. 12 Alerts and 4 pending Acknowledged Warnings require your attention. 2 Warnings fired that also need to be reviewed. You may not submit the report until all Alerts are resolved and you have acknowledged all warnings that require acknowledgement. You must also provide commentary on all Warnings with Commentary. Please select View Details to identify the Alerts and Warnings that require further review and action.
VIEW DETAILS
Terms & Conditions | Copyright | Help

- Click **Next** to increment to the next rule that was triggered, or click **Back** to view the previous rule. Use the navigation on the left to jump to a specific section of rules.



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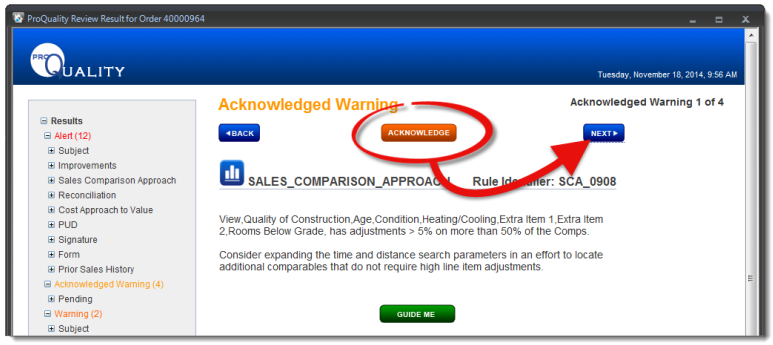
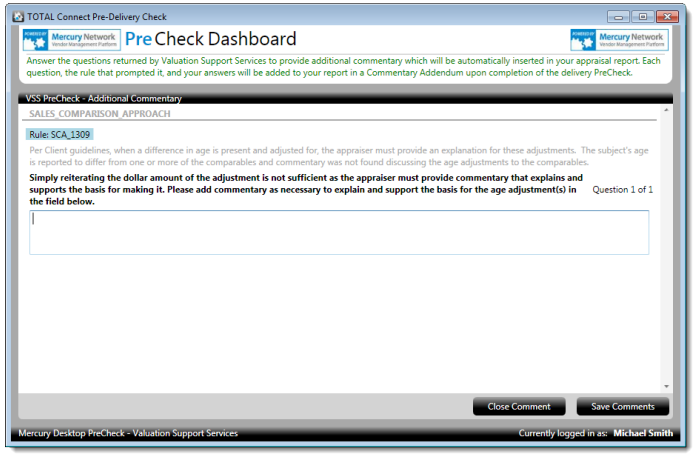
Note: If your report is unsigned, you can edit it while working in the ProQuality Review.

- If a warning must be acknowledged, review the warning details, click the orange **Acknowledge** button in the middle at the top, and click **Next** to proceed to the next rule. Click **Guide Me** for additional information or help with a specific rule.

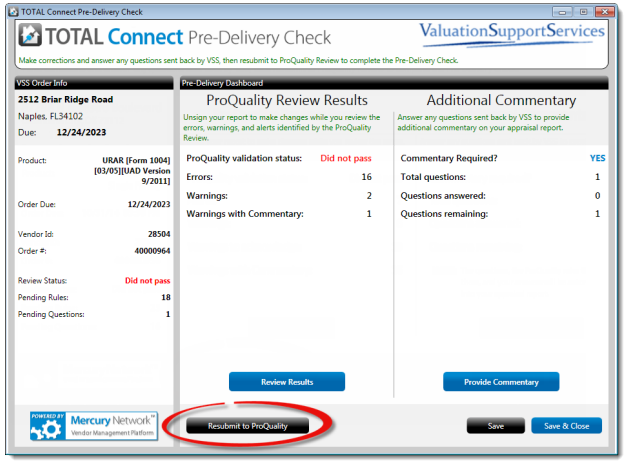


Provide Commentary

Click **Provide Commentary** to open a separate window to review and answer any questions that were returned by Valuation Support Services. Each question that was returned must be answered before the report will pass the VSS Pre–Delivery Check. While you're working on answering questions, save your progress at any time by clicking **Save Comments** on the lower right. When you're finished, make sure you've saved your answers by clicking **Save Comments**. Then, click **Close Comments** on the lower right to return to the Pre–Delivery Check.


TOTAL Connect Pre-Delivery Check
Pre Check Dashboard
Answer the questions returned by Valuation Support Services to provide additional commentary which will be automatically inserted in your appraisal report. Each question, the rule that prompted it, and your answers will be added to your report in a Commentary Addendum upon completion of the delivery PreCheck.
VSS PreCheck - Additional Commentary
SALES_COMPARISON_APPROACH
Rule: SCA_1309
Per Client guidelines, when a difference in age is present and adjusted for, the appraiser must provide an explanation for these adjustments. The subject's age is reported to differ from one or more of the comparables and commentary was not found discussing the age adjustments to the comparables.
Simply reiterating the dollar amount of the adjustment is not sufficient as the appraiser must provide commentary that explains and supports the basis for making it. Please add commentary as necessary to explain and support the basis for the age adjustment(s) in the field below.
Question 1 of 1
Close Comment
Save Comments
Mercury Desktop PreCheck - Valuation Support Services
Currently logged in as: Michael Smith

8. Once you have reviewed and acknowledged any rules that were triggered, and answered any questions that were returned, click **Resubmit to ProQuality** to begin the review process again and start over with Step 5.


TOTAL Connect Pre-Delivery Check
TOTAL Connect Pre-Delivery Check
ValuationSupportServices
Make corrections and answer any questions sent back by VSS, then resubmit to ProQuality Review to complete the Pre-Delivery Check.
VSS Order Info
2512 Briar Ridge Road
Naples, FL34102
Due: 12/24/2023
Product: URAR [Form 1004] [03/05][UAD Version 9/2011]
Order Due: 12/24/2023
Vendor Id: 28504
Order #: 40000964
Review Status: Did not pass
Pending Rules: 18
Pending Questions: 1
Pre-Delivery Dashboard
ProQuality Review Results
Unsign your report to make changes while you review the errors, warnings, and alerts identified by the ProQuality Review.
ProQuality validation status: Did not pass
Errors: 16
Warnings: 2
Warnings with Commentary: 1
Additional Commentary
Answer any questions sent back by VSS to provide additional commentary on your appraisal report.
Commentary Required? YES
Total questions: 1
Questions answered: 0
Questions remaining: 1
Review Results
Provide Commentary
Mercury Network
Resubmit to ProQuality
Save
Save & Close

9. Continue to revise your report until it passes the ProQuality Review. When your report passes, the ProQuality Review is complete and you're returned to your formfilling software. You can now deliver your report via the Valuation Support Services (VSS) plugin to complete the assignment.

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E-mail Delivery

Athena's EDI Center was a ground-breaking tool for its time. When this version was released, most appraisers did not have their own e-mail tools. Or if they did, they often came with severe limitations on the size of attachments. So the EDI Center and our Proj2000 e-mail services made a lot of sense.

Prior to the release of Aurora, though, the landscape shifted. Now, an overwhelming majority of appraisers utilize tools like Microsoft Outlook to handle all of their e-mail. Even now, WinTOTAL can automate report delivery through Outlook or your other default e-mail program in much the same way that Athena did with the EDI Center. There are two primary methods of delivering e-mail through e-mail:

- Sharing PDF reports
- Sharing WinTOTAL reports

The method you choose depends entirely on the intended recipient of your report.

Share WinTOTAL PDF Reports

PDF's are files that anyone can view. As such they are best suited when delivering your reports to your clients. If you're delivering your report to someone you want to update the report, sharing a WinTOTAL report should better suit your needs.

Note: Unprotected PDF's are still subject to tampering after you've delivered them. To ensure that no one tampers with the PDF copy of the report you send, see the PDF Options & Security section of this user guide.

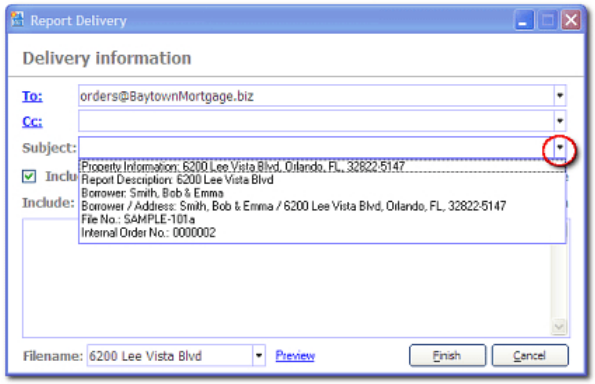
To share a WinTOTAL PDF via e-mail:

1. Once you've completed and signed your report in WinTOTAL, from the toolbar, choose **Share Report**, **WinTOTAL PDF via e-mail.** Or, if you've configured this as your default delivery method, just click **Share Report** in the toolbar.

   Note: See the Default Delivery Methods section of this user guide for more information about configuring your delivery default.

2.

3. Complete the necessary fields in the **Delivery Information** screen. To save time, you can automatically fill in most of these items based on the customer information from your report. Click the drop-down menus to see the automated information available for each field.



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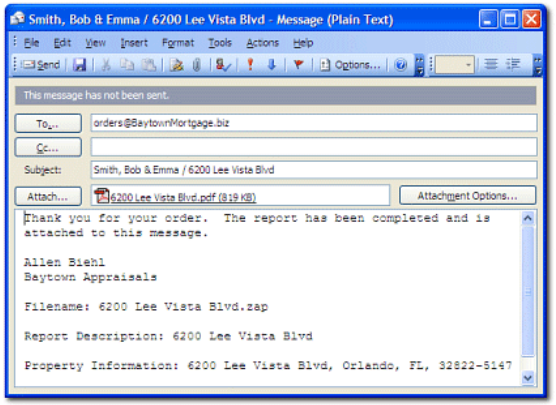
4. For the address fields, you can choose a recipient from your WinTOTAL Contacts Database. Click the **To** or **CC** link and double-click the appropriate contact to add that person to your **Message Recipients** list. Then, click **OK**.
5. You can also insert text directly into the e-mail message using information from your report. Check the **Include standard message text** box.


Smith, Bob & Emma / 6200 Lee Vista Blvd - Message (Plain Text)
File Edit View Insert Format Tools Actions Help
Send
Options...
This message has not been sent.
To...
orders@BaytownMortgage.biz
Cc...
Subject:
Smith, Bob & Emma / 6200 Lee Vista Blvd
Attach...
6200 Lee Vista Blvd.pdf (819 KB)
Attachment Options...
Thank you for your order. The report has been completed and is attached to this message.
Allen Biehl
Baytown Appraisals
Filename: 6200 Lee Vista Blvd.zap
Report Description: 6200 Lee Vista Blvd
Property Information: 6200 Lee Vista Blvd, Orlando, FL, 32822-5147

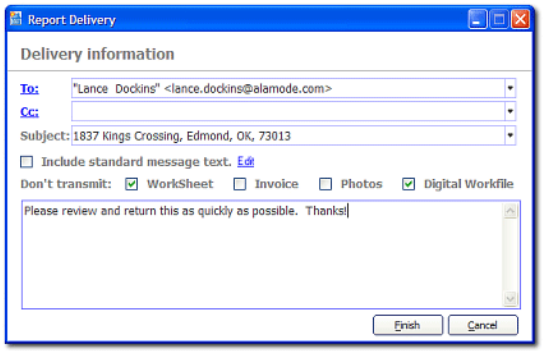
Note: For more information about using Message Templates, see the respective section of this user guide.

6. There are two remaining options to add automated text to your message. Check either **Acrobat download instructions** or **XSite Order Manager Information** to automatically insert the respective instructions that explain these useful tools to your customer.
7. If you use WinTOTAL's digital workfile feature, you can have a copy of the PDF file automatically added to it. This ensures that you always have an exact copy of the report you send to your customers. Check the **Save PDF to report's Workfile** box to enable this feature.
8. Click **Finish** and then select the forms you'd like to include in your report from the screen that appears.
9. Set any other options as necessary and then click **OK** to deliver your message.
10. Your report is generated and attached to an outgoing e-mail message from your default e-mail client, whether that's Microsoft Outlook, Outlook Express or any other MAPI-compliant e-mail tool. Click **Send** and you're done.

Share WinTOTAL Reports

As easy as it is to send a PDF report to your customers, it's just as easy to use your MAPI-compliant e-mail to share a copy of your WinTOTAL report with another appraiser for editing or review. To share a WinTOTAL report:

1. With your report open in WinTOTAL, choose **Share Report**, **WinTOTAL Report via e-mail** from the toolbar.
2. Complete the necessary fields in the **Delivery Information** screen.



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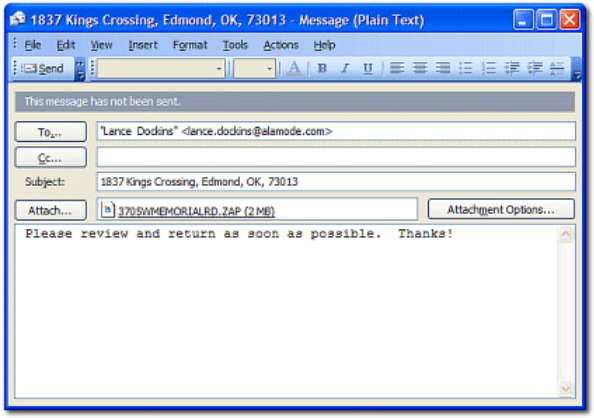
3. When sending a WinTOTAL report, can exclude some information that may not be appropriate to share with another appraiser, such as your **WorkSheet** or **Invoice**, from the report you send. Removing other features, like **Photos** or the **Digital Workfile** can reduce the size of the file you're going to send. Just check the boxes for any items which you wish to exclude from the report.
4. Click **Finish** to attach your report to an outgoing e-mail message from your default e-mail client - whether that's Microsoft Outlook, Outlook Express or any other MAPI-compliant e-mail tool. Then, just click **Send** to deliver the message.



Review Sent Reports

In past versions of WinTOTAL, you could view the reports you sent to customers in the EDI Center. In Aurora, the reports you send, like other e-mails, are saved in the **Sent Items** folder of your e-mail client (or whatever your e-mail software calls that folder). For example, to view the reports you sent through Microsoft Outlook…

1. Click the **Sent Items** folder in your list of folders on the left side of your Outlook window. Or from the menu choose **Go**, **Folder**, click **Sent Items**, and then click **OK**.
2. The reports you sent are saved in this folder. You can use any of Outlook's advanced features to sort or find a particular report.
3. Once you've found the report you want, you can resend it by opening the item, then choosing **Actions**, **Resend This Message** from the menus. Consult the documentation for your e-mail software for specific steps to accomplish these tasks.

Receive WinTOTAL Reports

In the past, chances are when you received a report from a colleague, you opened it with the old "EDI Center" in WinTOTAL Athena. Since Aurora no longer needs the EDI Center, you can now receive your reports directly through your default e-mail client. Launching the file attachment from there opens that report with WinTOTAL, just as you'd expect.

1. When someone sends you a WinTOTAL file, it now appears in your e-mail application like any other e-mail.
2. Open the e-mail message, click (or double-click, depending upon your e-mail application) the attachment, and choose **Open**.
3. If this is a file for a new report — rather than a file that you originally created and that has been returned — a screen appears allowing you to select which WinTOTAL folder you'd like to store the report in. Select the folder from the list and click **OK**.

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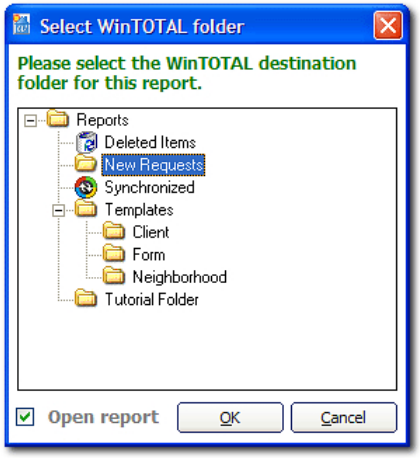

4. If this is a copy of an existing report, the **Update WinTOTAL Report** screen opens, showing details of the report you just received, as well as any existing reports in your WinTOTAL files list that match the new one. At this point, you can:
   - Select the desired report in the lower list and click **Replace** to overwrite the file on your system with the new file you received.
   - Click **New** to save the incoming file as a new report. You're then prompted for which folder you'd like the new report saved in. Choose an existing folder from the list and click **OK**.
   - Click **Cancel** to close the screen and perform no action.

Hint: If you'd like the report to open automatically in WinTOTAL after either replacing another report or starting a new one, make sure the **Open Report** box is selected.

Your report is saved on your system and, if you choose, opened in WinTOTAL, ready for you to edit, review or deliver.

Deliver with TOTAL Connect

If you are using your XSite or Mercury Network to track orders, or if your client has their own delivery plugin, the option to **Deliver with TOTAL Connect** is the delivery method to use. Before beginning the delivery process, TOTAL Connect must be installed and configured. Click here for step-by-step instructions on installing TOTAL Connect.

Once you have TOTAL Connect installed and configured, follow the instructions below to deliver your report using any of the delivery plugins:

1. Begin by clicking **Deliver to Client** on the upper left and hover over **Deliver with TOTAL Connect**.
2. Select the appropriate plugin from the list.
3. Follow the instructions in the delivery wizard to complete the delivery process.

Click here to view the complete TOTAL Connect User's Guide, or click here to find step-by-step instructions specific to the plugin you are using.

Billing & Business Management

WinTOTAL includes all the fundamental billing tools you need to create and send invoices to your clients. Plus, you can quickly enter full or partial payments as they're received, forming the basis for a simple accounting system. Couple WinTOTAL with your Appraisal XSite, however, and you've got a powerful business management toolkit providing features like:

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- Creating multiple invoices for each report
- Creating XSite Client Login accounts
- Enabling accounting functions to employees not running WinTOTAL
- Increased security for sensitive information – like fee splits
- Report tracking and business management tools available from any computer connected to the Internet

See our FAQ about the new billing processes at http://help.alamode.com/docs/5003.htm.

This section of the User's Guide provides step-by-step instructions for using all of the billing and business management functions in both WinTOTAL and Appraiser XSites. Click the check mark in the chart below to view specific help for the function and platform desired.

Frequent Functions	***Where to get it done...***	
	WinTOTAL	**XSite**
Enter new orders	✔	✔
Create invoice for order	✔	✔
Add misc. fees to invoices	✔	✔
Create stand alone invoices		✔
Send invoice to client	✔	✔
Record partial payments	✔	✔
Record full payments	✔	✔
Record payment for multiple reports	✔	✔
Process credit cards		✔

	Where to get it done...	
Periodic Processes	**WinTOTAL**	**XSite**
Define products and fees		✔
Assign client fee tables		✔
Create appraiser fee splits		✔
Publish coverage area		✔
Set up user accounts		✔
Set up client accounts	✔	✔
Record appraiser payments		✔
Run business reports		✔

In addition to these powerful WinTOTAL/XSite functions, some users may find it useful to export their WinTOTAL report information to Intuit's QuickBooks application for more specialized accounting functions. See the QuickBooks Integration section of this user guide for more information.

Configure XSites Billing

All of WinTOTAL's integrated invoicing and payment features work "right out of the box." However, if you plan to use the combined power of WinTOTAL and your XSite, you need to go through a couple of configuration steps first. This section details how to setup each portion of your XSite's Business Management tools and a few key configurations in WinTOTAL.

There are eight types of information you can configure. While not all of these sections pertain to every office, here's

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the definitive list of items you should take the time to configure in your XSite as they pertain to you.

- User Profiles
- Coverage Area
- Default Jobs & Fees
- Client Specific Fees
- Matching Fee Tables with Clients
- Appraiser Fee Splits
- Matching Fee Splits with Appraisers
- General Billing Options

Most of this configuration is done through the Business Management area of your XSite. To access it…

1. Log into your XSite.
2. Click **Business Management** at the top of the window.
3. Select the item you would like to configure from the **Navigation** menu on the left.

Defining User Roles

If you have multiple staff members (appraisers, apprentices, office admins) that will be using the WinTOTAL and XSite Business Management functions, then your first step is to build User accounts for each member of your staff, and assign a role to each. Once their user accounts are established, then each appraiser can link their copy of WinTOTAL or TOTAL Connect to the corporate XSite. Now, each staff member will only see order tracking information in XSites that relates to them. This helps keep such sensitive data as accounting data or appraiser fee split data in the hands of the right people. To create user accounts and apply the appropriate roles and privileges:

1. Hover your cursor over **My Office** in the main toolbar and click **User Management** in the toolbar that drops down.
2. Click **Add User** to create a new user account, or click any existing user's name in the list to open it for editing.
3. In the **User Information** section, choose the appropriate role for this user from the **Type:** drop-down menu.
4. Scroll down to the **User Privileges** section and add or delete any of the privileges.
5. Make any other changes to the user account you feel are necessary and remember to click **Save** when you're finished.

Note: The user account flagged as the "Admin" does not have a User Privileges section. By definition, the Admin has access to all facets of your XSite.

For more information about your XSite's User Permissions, see the User Privileges section of the Appraiser XSites User's Guide.

Setting Up Your Product List

Before your clients can begin placing orders on your website, you first need to set up the list of products you offer through your appraisal business. Your Appraiser XSite frees you to use any of the industry standard products like a URAR/Full

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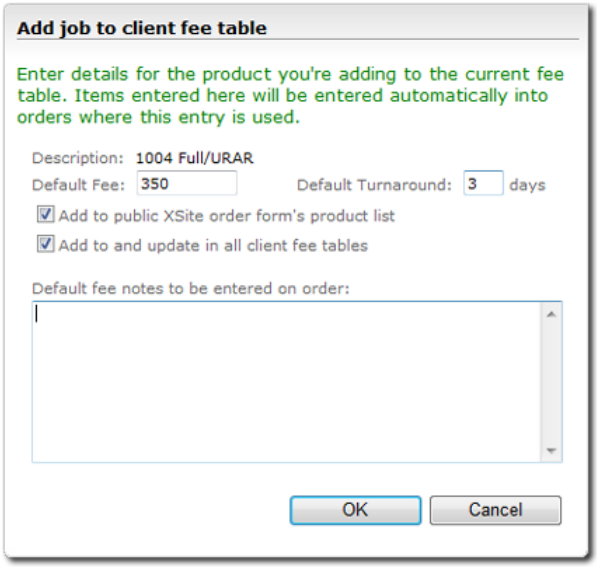
Appraisal or any custom product that you offer. To set up your product list:

1. From the Fees Setup section of your XSite's Business Management, click **Product List** in the links below the **Navigation** pane on the left.

2. Review the list of **Available Products** on the left. If any products that you offer are not listed in the Available Products list, click **Add new product.** Then, fill out any important details about the product and click **OK** to add it to your product list. Product details include:

   - **Description** - The label that appears in your XSite and in WinTOTAL for this product
   - **Default Fee and Default Turnaround -** The typical fee and turnaround time for this product
   - **Add to public XSite order form's product list** - Check this box if you want the product to appear in your public order form.
   - **Add to and update in all client fee tables** - Check this box if you want to offer this product or service and its associate fees and turnarounds to existing clients for whom you have custom fees.
   - **Default fee notes** - Any miscellaneous information about this product like mileage fees that may apply to the product.


Add job to client fee table
Enter details for the product you're adding to the current fee table. Items entered here will be entered automatically into orders where this entry is used.
Description: 1004 Full/URAR
Default Fee: 350
Default Turnaround: 3 days
Add to public XSite order form's product list
Add to and update in all client fee tables
Default fee notes to be entered on order:
OK
Cancel

3. As necessary, click any product in the **Active** list and then click the red left arrow to remove it from your **Active** products list.

4. Once you have all the products you need in the **Available** list on the left, click each product you wish to add to your product list and then click the green arrow between the **Active** and **Available** product lists to add it to your list.

Once you've configured your product list, you can set up client-specific fees, turnaround times, and more to cater to good clients.

Creating Client Specific Fee Lists

Once you've set up your master product list and the fees associated with it, you can also create client-specific fee lists

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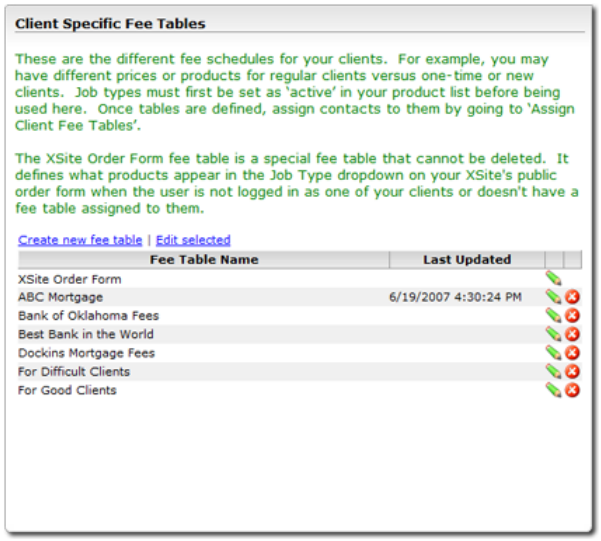
so you can cater to your clients. When you set up and assign these client specific fee lists, your XSite automatically distributes those fees to the clients you select. The next time clients with a custom fee list place an order, your XSite automatically shows them the custom fee you provided for them instead of the default fee associate with their order. To create a custom fee list…

1. From the Fees Setup section of your XSite's Business Management, click the **Define Client Specific Fees** link below the **Navigation** pane.
2. Click **Create new fee table** to create a new fee list or click an existing fee list and then **Edit selected** to open an existing list for editing.


Client Specific Fee Tables
These are the different fee schedules for your clients. For example, you may have different prices or products for regular clients versus one-time or new clients. Job types must first be set as 'active' in your product list before being used here. Once tables are defined, assign contacts to them by going to 'Assign Client Fee Tables'.
The XSite Order Form fee table is a special fee table that cannot be deleted. It defines what products appear in the Job Type dropdown on your XSite's public order form when the user is not logged in as one of your clients or doesn't have a fee table assigned to them.
Create new fee table | Edit selected
Fee Table Name
Last Updated
XSite Order Form
ABC Mortgage
6/19/2007 4:30:24 PM
Bank of Oklahoma Fees
Best Bank in the World
Dockins Mortgage Fees
For Difficult Clients
For Good Clients

3. In the screen that appears, type a name that identifies this fee list (like ABC Mortgage's Fees, for instance).
4. For any products that you need to add to this client specific fee list , click **Add new product**, select the product from the list of active products that you offer and fill out the fee, turnaround, and other details for the product. Then, click **OK**.
5. For any products that you need to remove from this client specific fee list, just click the **Delete** icon beside it and then click **OK** to confirm that you wish to remove it from your fee list.
6. Then, for each product in the fee list, click the pencil to the right of the product, change the fee, turnaround, notes, or other details for the product, and click **OK** to save it back to your client specific fee list.
7. When finished, click **Save**.

Once you've created all of the client specific fee lists you need, you must assign them out to your clients.

Assigning Client Fee Lists

To associate a client with a custom fee table:

1. From the Fees Setup section of your XSite's Business Management, click the **Assign Client Fee Tables** link below the **Navigation** pane.
2. All of the people in your contacts database that you've designated as a "Client" or "Lender" are displayed. Add or update any clients as necessary.
   - To add a new client to the list, click **Add new client**, fill out the contact details, and then click **Save**.
   - To edit an existing client, click to select the client, click **Edit client contact record**, make any necessary changes, and then click **Save**.

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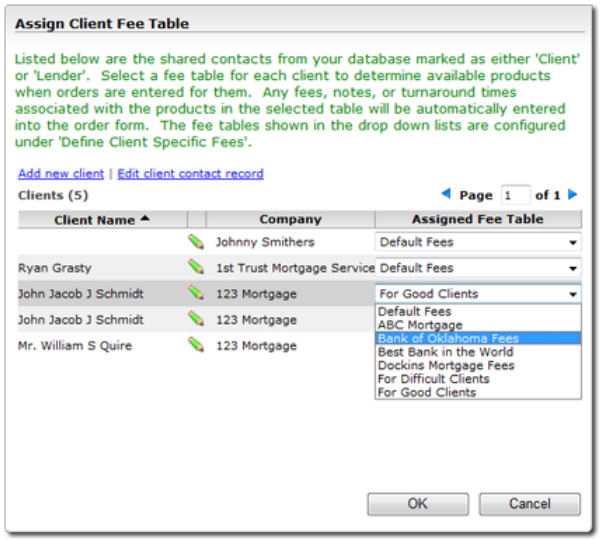
3. Then, to assign a custom fee list to a client, select the desired fee list from the drop-down menu to the right of that client.


Assign Client Fee Table
Listed below are the shared contacts from your database marked as either 'Client' or 'Lender'. Select a fee table for each client to determine available products when orders are entered for them. Any fees, notes, or turnaround times associated with the products in the selected table will be automatically entered into the order form. The fee tables shown in the drop down lists are configured under 'Define Client Specific Fees'.
Add new client | Edit client contact record
Clients (5)
Page 1 of 1
Client Name
Company
Assigned Fee Table
Johnny Smithers
Default Fees
Ryan Grasty
1st Trust Mortgage Service
Default Fees
John Jacob J Schmidt
123 Mortgage
For Good Clients
John Jacob J Schmidt
123 Mortgage
Mr. William S Quire
123 Mortgage
Default Fees
ABC Mortgage
Bank of Oklahoma Fees
Best Bank in the World
Dockins Mortgage Fees
For Difficult Clients
For Good Clients
OK
Cancel

4. When finished, click **OK** to save your changes.

Setting Up Your Coverage Area

To maximize the exposure your business has on the Internet, it's important to set up your coverage area. By doing this, you will list yourself as an active appraiser in the various counties you cover on our XSites Network and increase the potential for new business through your Appraiser XSite. To set up your coverage area:

1. In the screen that appears, click **Add**.
2. A list of states and provinces in the US and Canada appears. Click the link corresponding to the state or province of your choice.
3. When the list of counties appears, simply check all of the counties that apply to your coverage area. Use the **Select All** and **Clear All** buttons at the bottom of the window to quickly select or deselect all the counties in the state of province of your choice.
4. When youâ€™ve selected all the applicable counties in the state or province of your choice, click **Add** at the bottom of the screen to save your changes and continue adding counties in other states or click **Done** to return to your completed list of counties covered.

Setting Up Your Fee Splits

Before you can take full advantage of your XSite's employee payment tracking tools, you must first setup your appraiser fee splits.

1. From the Fees Setup section of your XSite's Business Management, click the **Define Appraiser Splits** link below the **Navigation** pane.
2. Now, click **Create new fee table**.
3. Type a name for your fee table such as "Staff Appraiser" or "Trainee" in the box provided.
4. Add or remove any products with which you have appraiser fee splits to the list.
   - To add a product, select each of the products with which you intend to split the fees from the **Active product**

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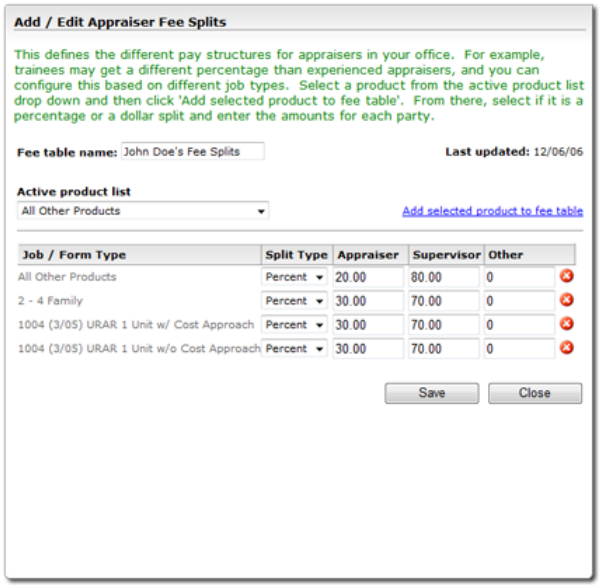
list drop-down menu and click **Add selected product to fee table**.

- To remove a product later, just click the **Delete** link beside it in the grid below.

Hint: If your split amount or percentage is consistent across multiple appraisal products, you can simply fill out the varying splits for the products to which they apply and then choose **All Other Products** for the consistent split to save time.

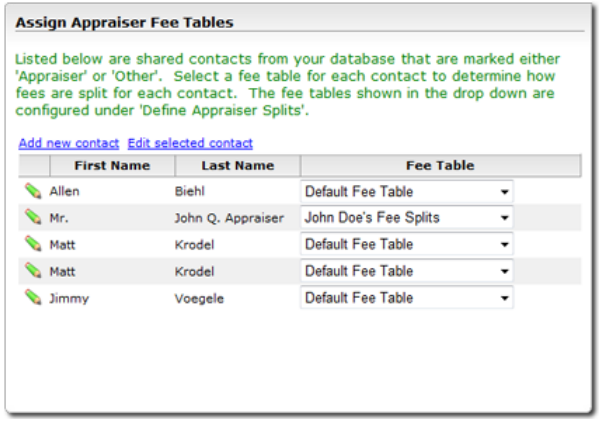

Add / Edit Appraiser Fee Splits
This defines the different pay structures for appraisers in your office. For example, trainees may get a different percentage than experienced appraisers, and you can configure this based on different job types. Select a product from the active product list drop down and then click 'Add selected product to fee table'. From there, select if it is a percentage or a dollar split and enter the amounts for each party.
Fee table name: John Doe's Fee Splits
Last updated: 12/06/06
Active product list
All Other Products
Add selected product to fee table
Job / Form Type
Split Type
Appraiser
Supervisor
Other
All Other Products
Percent
20.00
80.00
0
2 - 4 Family
Percent
30.00
70.00
0
1004 (3/05) URAR 1 Unit w/ Cost Approach
Percent
30.00
70.00
0
1004 (3/05) URAR 1 Unit w/o Cost Approach
Percent
30.00
70.00
0
Save
Close

5. Once you've added all necessary products, for each product choose a **Split Type** (percentage/dollar amount) and enter the split percentages/amounts into the **Appraiser**, **Supervisor** and **Other** fields.
6. When finished click **Save** and indicate whether you want to backdate your changes to any existing orders.

Assigning Your Fee Splits

Once you've created your appraiser fee split tables, it's necessary to assign them to the appraisers in your office.

1. From the Fees Setup section of your XSite's Business Management, click the **Assign Fee Splits** link below the **Navigation** pane.
2. All of the people in your contacts database that you've designated as a "Appraiser" are displayed. Add or update any appraisers as necessary.
   - To add a new appraiser to the list, click **Add new contact** , fill out the contact details, and then click **Save**.
   - To edit an existing appraiser, click to select the appraiser, click **Edit selected contact**, make any necessary changes, and then click **Save**.
3. Finally, choose the appropriate fee split list from the drop-down menu beside each appraiser to assign your split lists.


Assign Appraiser Fee Tables
Listed below are shared contacts from your database that are marked either 'Appraiser' or 'Other'. Select a fee table for each contact to determine how fees are split for each contact. The fee tables shown in the drop down are configured under 'Define Appraiser Splits'.
Add new contact
Edit selected contact
First Name
Last Name
Fee Table
Allen
Biehl
Default Fee Table
Mr.
John Q. Appraiser
John Doe's Fee Splits
Matt
Krodel
Default Fee Table
Matt
Krodel
Default Fee Table
Jimmy
Voegele
Default Fee Table

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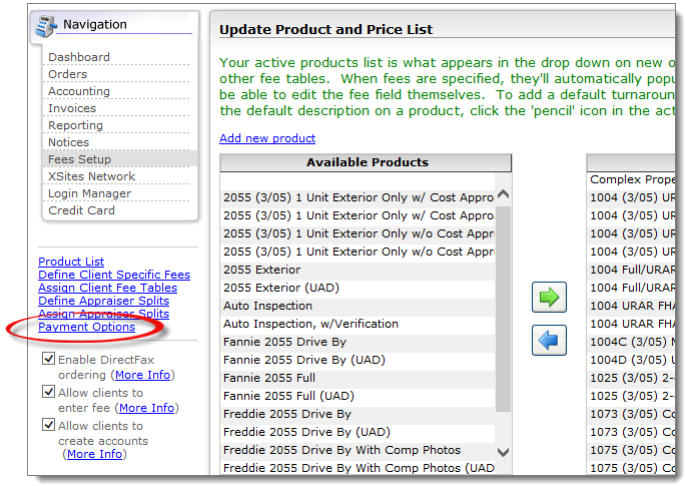
Setting Up Billing Preferences

When creating invoices on your XSite, you can have the payment method already filled in with a specific entry for each client. This is particularly useful for requiring credit card payments from certain clients.

1. From the Fees Setup section of your XSite's Business Management, click the **Payment Options** link below the **Navigation** pane.


Navigation
Dashboard
Orders
Accounting
Invoices
Reporting
Notices
Fees Setup
XSites Network
Login Manager
Credit Card
Product List
Define Client Specific Fees
Assign Client Fee Tables
Define Appraiser Splits
Assign Appraiser Splits
Payment Options
Enable DirectFax ordering (More Info)
Allow clients to enter fee (More Info)
Allow clients to create accounts (More Info)
Update Product and Price List
Your active products list is what appears in the drop down on new o
other fee tables. When fees are specified, they'll automatically popu
be able to edit the fee field themselves. To add a default turnaroun
the default description on a product, click the 'pencil' icon in the act
Add new product
Available Products
2055 (3/05) 1 Unit Exterior Only w/ Cost Appro
2055 (3/05) 1 Unit Exterior Only w/ Cost Appro
2055 (3/05) 1 Unit Exterior Only w/o Cost Appr
2055 (3/05) 1 Unit Exterior Only w/o Cost Appr
2055 Exterior
2055 Exterior (UAD)
Auto Inspection
Auto Inspection, w/Verification
Fannie 2055 Drive By
Fannie 2055 Drive By (UAD)
Fannie 2055 Full
Fannie 2055 Full (UAD)
Freddie 2055 Drive By
Freddie 2055 Drive By (UAD)
Freddie 2055 Drive By With Comp Photos
Freddie 2055 Drive By With Comp Photos (UAD
Complex Prope
1004 (3/05) UR
1004 (3/05) UR
1004 (3/05) UR
1004 (3/05) UR
1004 Full/URAR
1004 Full/URAR
1004 URAR FHA
1004 URAR FHA
1004C (3/05) N
1004D (3/05) U
1025 (3/05) 2-
1025 (3/05) 2-
1073 (3/05) Co
1073 (3/05) Co
1075 (3/05) Co
1075 (3/05) Co

2. If you want to enable your XSite's client accounting features so that your clients can view their payment and invoice histories, check the **Enable Client Accounting** box.

Note: For your XSite's Client Accounting tools to function properly, you must use your XSite (whether via WinTOTAL synchronization or directly from your XSite) to manage your invoices and payments.

3. If you want to require clients to pay by credit card, check the boxes to require all new clients, all clients, or both. When the clients you specify order from your XSite while these options are enabled, they are required to supply a credit card number with the order. Remember that you must first enable your XSite's credit card processing tools for this to work.

4. Mark the payment methods you accept. These appear in a drop-down on your XSite order form and invoice forms for your clients to see.

5. If you want to require that your clients pay you before they can pick up their reports, find and select those clients in the **Available Clients** list of the **Require Payment Before Delivery** section. Then, click the right arrow to add them to the **Require Payment** list. If you decide to remove these clients later, return to this section, select the clients in the **Require Payment** list and click the left arrow to remove them.

6. If you want to require credit card payment for specific clients instead of globally requiring it for all clients, find and select the clients you wish to pay by credit card from the **Available Clients** list in the **Require Client to Pay by Credit Card** section. Then, click the right arrow to add the clients to the list of those required to pay by credit card. If you decide to remove these clients later, return to this section, select the clients in the **Require Credit Card** list and click the left arrow to remove them.

7. When finished, click **Save** to save your changes.

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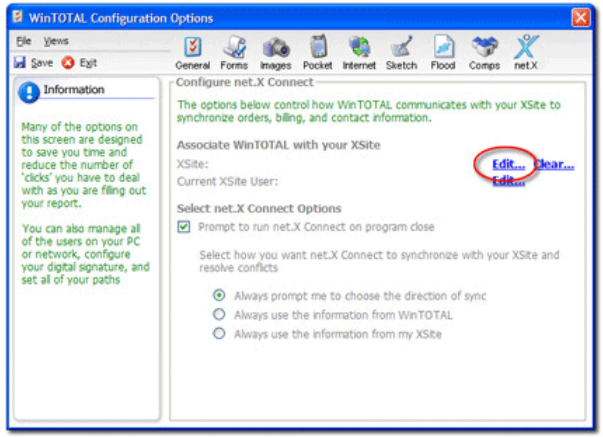
Configure WinTOTAL Billing

Before integrating with your XSite, you need to make sure you've told WinTOTAL your XSite domain and login information.

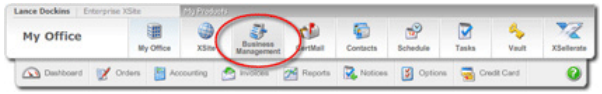
1. In WinTOTAL, click **Options** and then **Configure WinTOTAL Settings**.


WinTOTAL Configuration Options
File Views
Save Exit
General Forms Images Pocket Internet Sketch Flood Comps net.X
Information
Many of the options on this screen are designed to save you time and reduce the number of 'clicks' you have to deal with as you are filling out your report.
You can also manage all of the users on your PC or network, configure your digital signature, and set all of your paths
Configure net.X Connect
The options below control how WinTOTAL communicates with your XSite to synchronize orders, billing, and contact information.
Associate WinTOTAL with your XSite
XSite:
Current XSite User:
Edit... Clear...
Edit...
Select net.X Connect Options
Prompt to run net.X Connect on program close
Select how you want net.X Connect to synchronize with your XSite and resolve conflicts
Always prompt me to choose the direction of sync
Always use the information from WinTOTAL
Always use the information from my XSite

2. Click the **net.X** icon in the toolbar at the top to access the net.X configuration options.
3. From there, use the **Edit** link to the right to enter your XSite **Username** and **Password**.
   - Your XSite information is specific to your WinTOTAL user profile. The net effect is that network users can plug in their individual XSite logins so they only work with orders assigned to them.
   - If you're a single user, mark the option to save your password. However, appraisers in a multi-user office may wish to leave that disabled, requiring password entry when WinTOTAL needs to talk to your XSite.
   - If you're not the admin user for the XSite, the **Accounting and Order Management** option under XSite User Management must be enabled.
4. Click **OK** to save your information and then click **Save** to accept your new configuration.
5. Once you've correctly entered XSite information into WinTOTAL, WinTOTAL sends a signal to your XSite and enables the new "Business Management" features which replace the "Orders" interface we previously had.

Use XSites Billing

Once you've setup your XSite with all the necessary information about your office, you're ready to begin using the advanced features inside your Appraiser XSite. While the workflow that best suits your office may vary, this section follows the general workflow during the life of an appraisal. To access all of your XSite's Business Management tools, log into your XSite and click **Business Management** in the top toolbar.



Dashboard

As you use XSites business management to manage your billing and invoicing needs, your XSite tracks your billing activities so that you can easily monitor them from right within Business Management.

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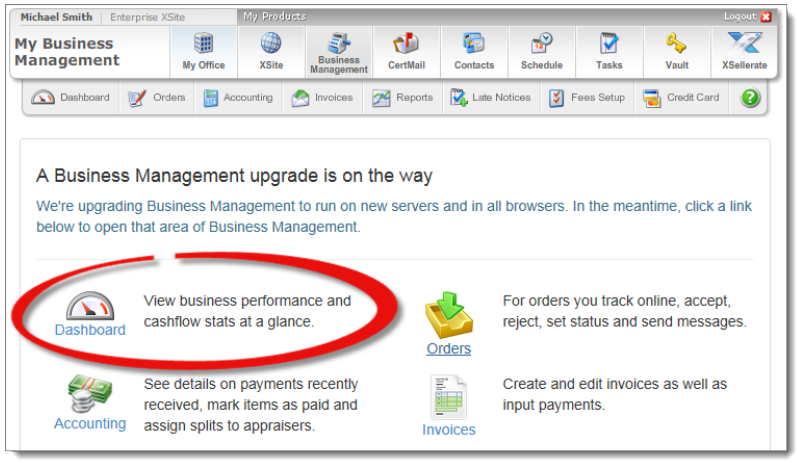
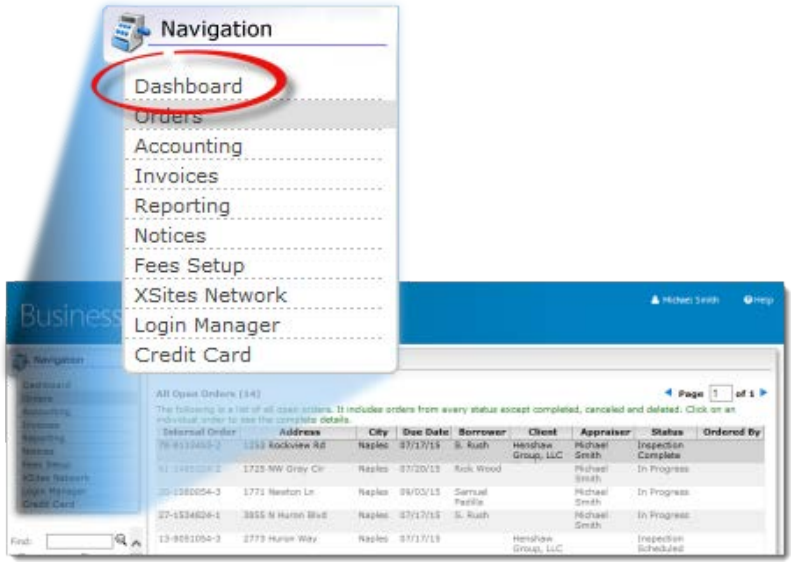
The dashboard provides a high level overview of your recent billing activities so you can quickly get an understanding of your recent workload, top clients, and billed work. To use the business management dashboard…

1. Log in to your XSite, and click **Business Management** in the toolbar at the top.

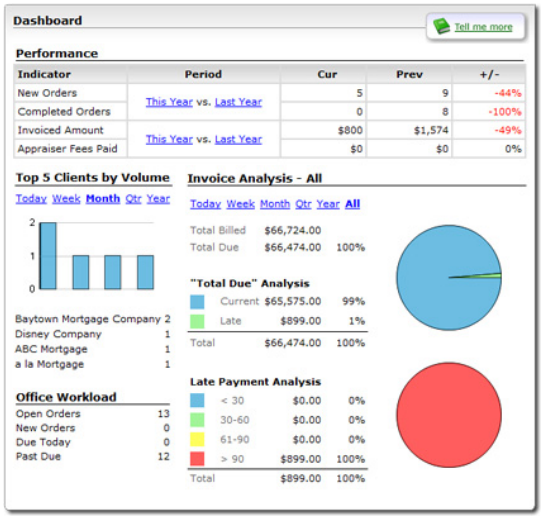
2. From the Business Management landing page, click **Dashboard** on the left.



If you're starting from a different area of Business Management, click **Dashboard** in the **Navigation** pane on the left.



3. Then, use the filters to indicate the time range you want to review. There are four key areas your XSite's Dashboard offers to help you track your billing activities:



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Performance:

Allows you to track the progress of your business against prior days, weeks, quarters, or years. The default time ranges for comparison are **This Year** and **Last Year** to help you compare this year's performance against last year's. You can monitor the quantity of your new and completed orders or monitor your volume by dollar figure. To change the time ranges, simply click the link in the **Period** column.

Top 5 Clients by Volume:

You can control the time range for this "report" by clicking the Today, Week, Month, Qtr, and Year links.

Office Workload:

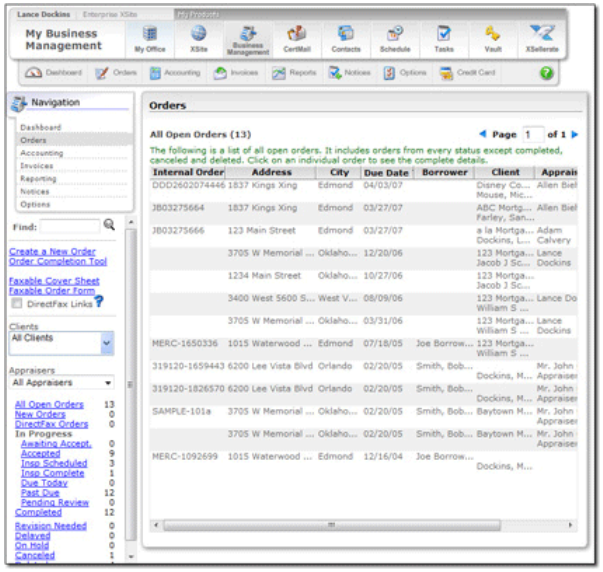
This is a breakdown of all orders that are still in progress based on the internal status logged in your XSite.

Invoice Analysis:

Click between **Today**, **Week**, **Month**, **Qtr**, **Year**, and **All** to view a snapshot of your invoicing, including **Total Billed** and **Total Due**, the **Current** due and **Late** invoices in the **"Total Due" Analysis**, and you can also monitor the frequency of overdue payments via the **Late Payments Analysis** at the bottom.

Work with XSite Orders

XSites provide a number of power order management functions you can use to keep track of your appraisal work, keep your clients up to date, and generate invoices with just a few clicks. To access the order manager on your XSite, click **Orders** in the left pane inside Business Management.



Once you've entered your XSite's order manager, you have a lot of options to find the orders you need:

- Your web-based order management system first shows you a list of all your open orders with their present, or most recent, status and some high-level statistics about orders on your XSite.
- While viewing this list, you can sort it by clicking a column heading.
- You can view orders based on their status by clicking a status item from the left side of the screen.
- To limit the orders to just those received from a particular client, pick that client from the drop-down list.
- Similarly, to limit the orders to just those assigned to a particular appraiser, pick that appraiser from the drop-down list.
- If you have too many orders to fit them all in one screen (as designated by the page numbers in the upper right

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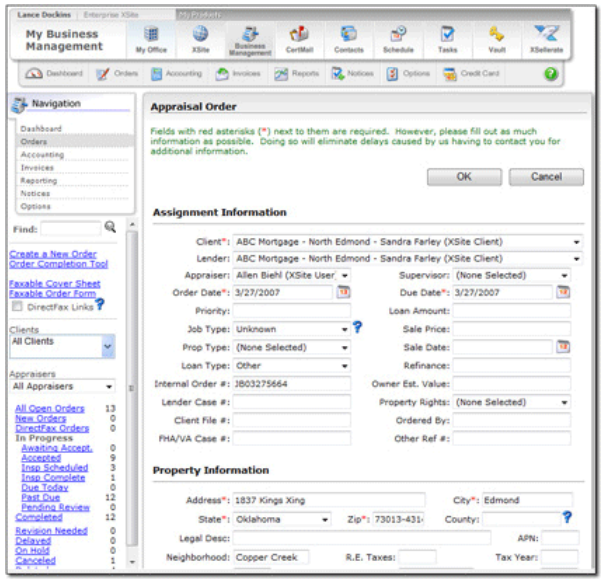
corner of the screen), just click one of the available arrows or enter a page number.

- To view the details of an order or take action on it, double-click it.

Create XSite Orders

At any time, from any computer connected to the Internet, you can log into your XSite and place an order. To create a new order on your XSite…

1. From your XSite's order manager, click **Create a New Order** below the **Navigation** pane on the left.



2. Fill out the order form. Notice there are drop-downs for Clients, Lender, Appraiser and other contacts, which are pulled from your Contacts Database. Likewise, your default job types are pulled from our Fee Tables.
3. Click **OK** when you're finished.

The next time you synchronize WinTOTAL, this new order appears in your Appraisal Desktop's **New Requests** folder.

Edit XSite Orders

Using the same tool your XSite provides to help you create new orders, you can easily edit any existing order in your site. To edit an existing order in your XSite…

1. From your XSite's order manager, double-click any order in the list to access details and make changes to it.
2. At the top of the **Order Details** pane there are a number of options for working with your orders. Click the option to perform the desired action on the selected order. Options include:
   - **Status -** Depending on the current status of the order, you have different options when you click this button. For example, if an inspection hasn't been scheduled, it defaults to that status item.
   - **Edit –** Use this button to edit the original order form.
   - **Message -** This option sends the client an e-mail and logs the communication permanently with the order.
   - **Attach –** Use this tool to upload documents or use the DirectFax feature that digitizes things you fax to your website
   - **Print** – This button generates a hard copy of the order details.
   - **Billing** - This allows you to generate invoices from the information contained in your XSite order. In addition,

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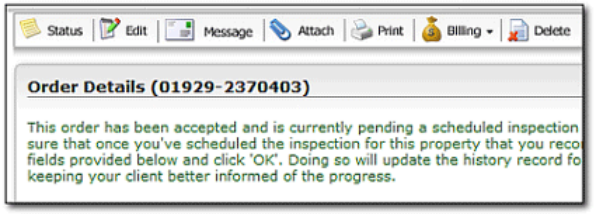
you can also use this to quickly take credit card payments for the active order.

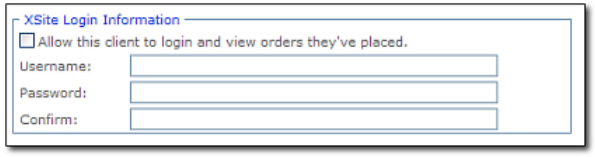
- **Delete** - This naturally takes an order out of your active list. You may want to use **Delete** on test and sample orders so they don't affect your statistics and reporting.


Status
Edit
Message
Attach
Print
Billing
Delete
Order Details (01929-2370403)
This order has been accepted and is currently pending a scheduled inspection
sure that once you've scheduled the inspection for this property that you reco
fields provided below and click 'OK'. Doing so will update the history record fo
keeping your client better informed of the progress.

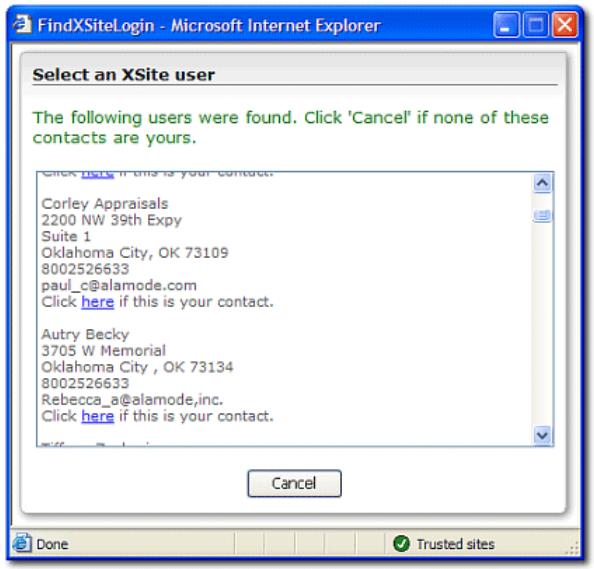
Create Client Accounts

Your XSite's contact manager allows you to create login accounts for your clients to use on your XSite. These accounts allow your clients to place orders online, check status on the orders, and pick up orders online. If you want to create a client login account for one of your clients.

1. In your XSite, click **Contacts** in the top toolbar to open your contact manager.
2. Fill in any of the necessary **Contact Information** for this client.
3. Mark the **Type of Contact** as either a **Lender** or **Client** by checking the appropriate **Type** box and then click **Save**.
4. Once the contact is finished saving, an **XSite Ordering Options** section appears. Check the **Allow this client to login** box.



5. If you're creating a new client login account, type a **Username** and **Password** for your client, ensuring that you type the same password in the **Confirm** field as well. Then skip to step 8.
6. If you want to attach an existing client login or XSites Network account to your contact, click the **here** link below the **Username** and **Password** information.
7. A list of potentially related accounts should appear. Search through the list and find the account you want to associate with your contact.



8. When you find it, click the link at the bottom of the contact information for that client and confirm the change.

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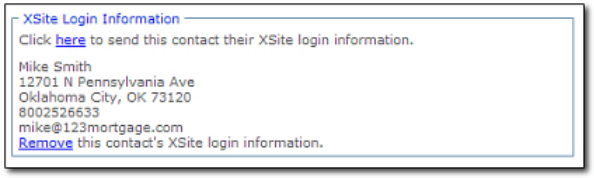
9. If you wish to disable any or all automatic status notifications for this contact, indicate so by marking the appropriate options in the **Disable Notifications** section.
10. Finally, if you want to inform your client that he or she can now log into your XSite using the login account you associated, click the **here** link that appears in the **XSite Login Information** section of your contact details to send the client the information.



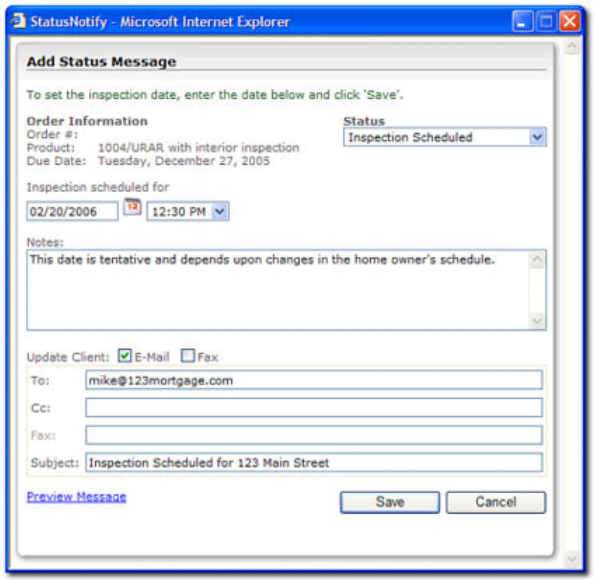
11. When you're finished, click **Save**. If you created a new client login account, your client is immediately e-mailed the relevant information including the **Username** and **Password** you created.

Your client can now log into your XSite and place, view, or manage appraisal orders. If you wish to remove their account at any time, just edit their contact at any time, and click **Remove** in the **XSite Login Information** section of their **Contact Information**.

Change XSite Order Status

As you continue to work on an order, you may need to change its status several times to keep your client informed about your progress. At any time, you can go back and change the status of an order by simply opening the order for editing as described in the prior section.

1. From your XSite's order management, find and double-click the order you wish to edit.
2. When the order details appear, click **Status** in the top toolbar.
3. You're offered a set of statuses to choose from. Simply choose the appropriate status from the drop-down menu and fill out any date related information as necessary.
4. If you wish to include some notes with the change in status, type them in the available field.
5. If you would like to send a notification to the client(s) informing them about the status change, check the boxes indicating the method of notification, fill out any necessary contact information and choose a **Subject** for the message.
6. Click **Save** when finished to update the status of the order and relay any necessary updates to the client(s).



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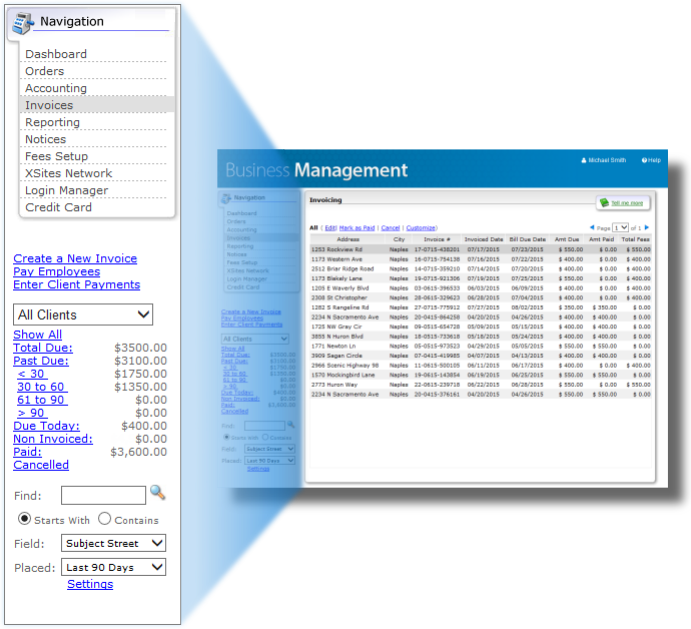
Invoicing

Your XSite's invoice manager provides a number of ways you can invoice your clients depending on the needs of the order. With your XSite's invoice manager, you can:

- Invoice an appraisal order
- Generate an invoice for miscellaneous work
- Manage and deliver your invoices
- Track your recent invoice activity

To open your XSite's invoice manager, click the **Invoices** button in the **Navigation** pane to the left of Business Management.



Note: If you use WinTOTAL Aurora as your formfilling software, you can manage your invoices from within WinTOTAL without ever accessing your XSite. All you need to do is to enable WinTOTAL's **XSite Integration** features. For more information about this process, see your WinTOTAL user's guide.

In the invoice manager, the left side of the screen shows a snapshot and totals for all your invoices. You can quickly filter this list for a particular client using the drop-down list. Likewise, to see the list of invoices in a subtotal, just click the description such as "30 days", "60 days", etc.

Creating Order Invoices

If you already have an order for a particular appraisal, you need not create a new invoice for that order from scratch. Your XSite can build the invoice from the existing order and the fee information you provided when setting up Business Management. To create or edit an invoice for an order:

1. From your XSite's order management, find and double-click the order you want to invoice.

2. In the **Order Details** screen, click **Billing** in the top toolbar and select **Invoice** from the menu that appears.

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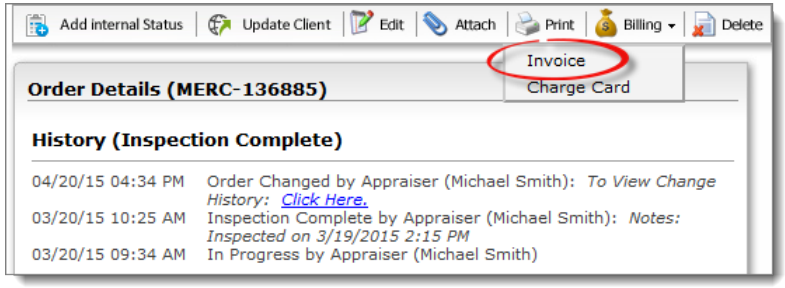
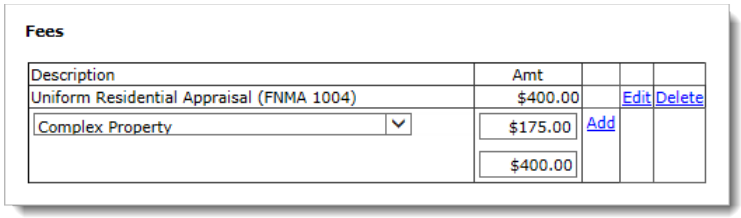

Add internal Status
Update Client
Edit
Attach
Print
Billing
Delete
Invoice
Charge Card
Order Details (MERC-136885)
History (Inspection Complete)
04/20/15 04:34 PM Order Changed by Appraiser (Michael Smith): To View Change History: Click Here.
03/20/15 10:25 AM Inspection Complete by Appraiser (Michael Smith): Notes: Inspected on 3/19/2015 2:15 PM
03/20/15 09:34 AM In Progress by Appraiser (Michael Smith)

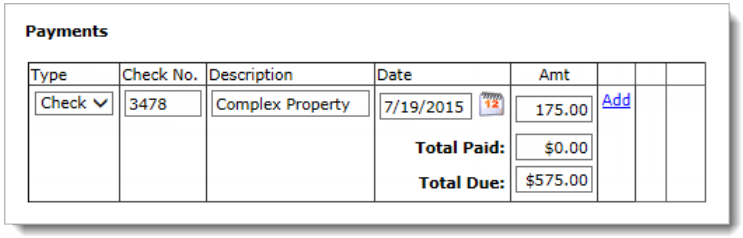
3. When the **Create/Edit Invoice** screen appears, the invoice is automatically populated with information from the order. From here, you have a few options:

Note: If you entered any fee or payment information for this order in WinTOTAL, this information is reflected in the invoice as well after synchronizing WinTOTAL with your XSite via net.X connect.

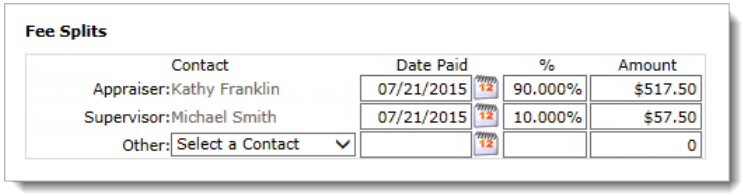
- Change any items for your invoice by typing the new information in the appropriate text box.
- To edit existing fees, click the **Edit** link next to the fee.
- To add an additional line item charge, select the fee description from the drop-down menu. If you want to add a fee that isn't included in your products list, manually enter the Description and the fee amount. Once you've selected the fee or entered a new fee, click **Add** to update your invoice and add the new fee.



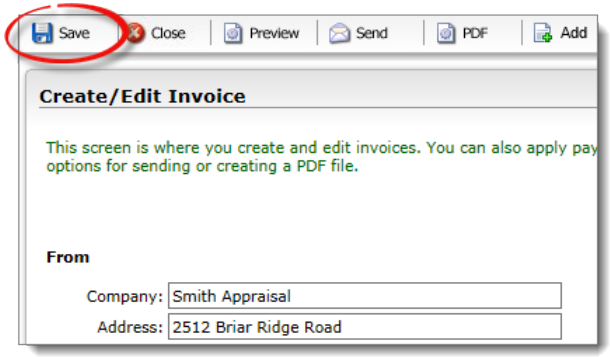
- To enter a payment you've received from your client, select the payment type, enter any additional details about the payment, and click **Add** to update the invoice with the payment.



- Depending on your **User Privileges**, the **Fee Splits** area may be enabled. Here, you can choose who receives portions of the fee(s) received, the date paid, their percentage, and the amount paid.



4. When you're finished, click **Save** on the upper left.



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Creating Miscellaneous Invoices

In addition to invoices attached to orders, your XSite can help you create and deliver invoices for additional services.

1. From your XSite's Invoice Manager, click **Create a New Invoice** below the **Navigation** pane on the left.
2. Complete the invoice form, using the **Lookup** drop-down menu in the **Bill To** section to select a client from your Contacts database. Or, just fill in the blanks.
3. Now complete the **Fees** section and deliver the invoice as described in the Delivering Invoices section of this user's guide or click **Save** to save the invoice until later.

Deliver XSite Invoices

Once you've completed your invoice, you can easily send it out to your client independently from your report. To do so…

1. From your XSite's invoicing tools, find and double-click an invoice you wish to send.
2. When the invoice opens, use one of the buttons across the top to preview your invoice, deliver it directly, or create a PDF you can send manually. Options include:
   - **Save** - To save any changes you made to the invoice.
   - **Preview** - To see how the printed invoice looks. (Click **Close** when in the preview to return to the invoice.)
   - **Send** - To send a PDF copy of your invoice straight from your XSite. An on-screen form then lets you compose an e-mail message to accompany the PDF.
   - **PDF** - To have your XSite create and open a PDF copy of the invoice. From there, you can work with it like any other PDF, perhaps saving a local copy or attaching it an e-mail.

Canceling Invoices

Cancelled invoices are neither due nor paid and show up in your **Cancelled** filter.

1. In your XSite's invoice manager, locate the invoice you wish to cancel using any of the links on the left side of the window. Or, use the **Find** text box to search for an invoice.
2. Select the invoice from the list on the right, and then click **Cancel**.

Customizing the Invoice Grid

If you prefer to see different information in your XSite's Invoice Manager grid than what you see by default, you can customize it to show the information that works best for you. To do so:

1. From your XSite's invoice manager, click **Customize**.

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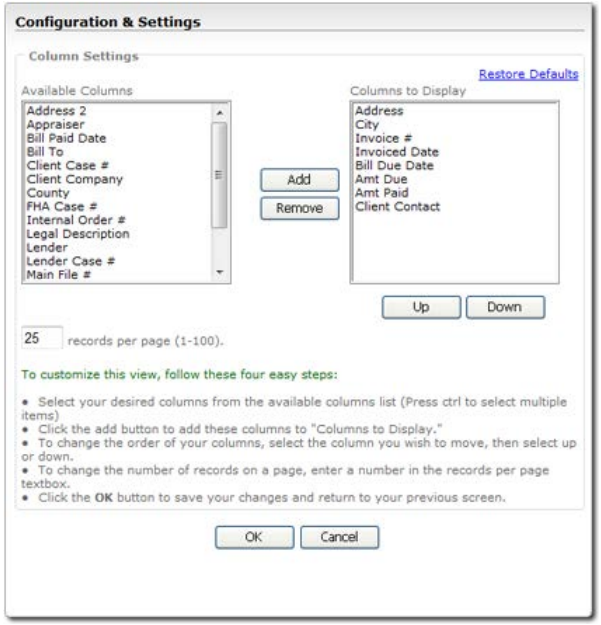
2. In the screen that appears, add, remove, and sort the columns you want to appear in the invoice list using the tools provided.
   - Choose a column from the list on the left and click **Add** to add it to your invoice grid.
   - Choose a column from the list on the right and click **Remove** to remove it from your invoice grid.
   - Click a column in the list on the right and then click the **Up** and **Down** buttons to rearrange the columns in your invoice grid.
3. Click **OK** (at the bottom of the window) when you're done.

Note that when viewing your list of invoices, you can click a column heading to sort on that column. Click the column again to toggle between an ascending and a descending sort.



Payments

Your XSite's billing tools include an array of payment tools that have never been available in WinTOTAL or XSites before. Just as there are several different types of payments you have to track as you manage your business from day to day, XSites provide simple tools to help you easily log partial payments, full payments, balloon payments, and employee payments.

All of your XSite's payment tools are located inside business management. To access them, visit either your XSite's invoice manager OR through the accounting view that helps you review your recent payment activities.

Recording Full Payments

When looking at your list of invoices, you can quickly mark an invoice as paid in full on the current date.

1. In your XSite's invoice manager, locate the invoice you wish to edit using any of the links on the left side of the window. Or, use the **Find** text box to search for an invoice.
2. Select the invoice from the list on the right and click **Mark as Paid**.

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If you need to log more details with your payment, such as a note or check number, you should use the **Edit** feature.

Recording Partial Payments

If you need to record a partial payment for an individual order via your XSite:

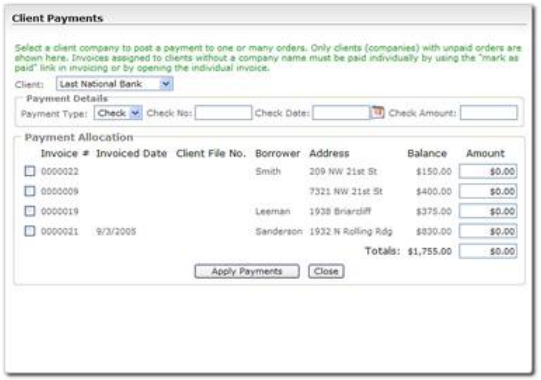
1. From your XSite's invoice manager, find the invoice you wish to update and double-click it to edit it.
2. Scroll down to the **Payments** add the payment type, date, amount, and description to the available fields and click **Add** to record it.
3. When finished, click **Save** in the toolbar to update your invoice.

Note: To properly record a balloon payment that covers numerous appraisals, see the Paying multiple invoices section of this manual.

Recording Balloon Payments

When a client writes you one check for multiple invoices, you don't have to go into each invoice individually and mark them as paid. Instead, use the **Enter Client Payments** tool to distribute the payment over several invoices.

1. From your XSite's invoice manager, click **Enter Client Payments** just below the **Navigation** pane on the left.
2. Select the desired client from the drop-down list. All open invoices for that client are quickly displayed.
3. Enter the check number, the date, and the amount.
4. Mark the invoices that are being paid and the amount paid on each.


Client Payments
Select a client company to post a payment to one or many orders. Only clients (companies) with unpaid orders are shown here. Invoices assigned to clients without a company name must be paid individually by using the "mark as paid" link in invoicing or by opening the individual invoice.
Client: Last National Bank
Payment Details
Payment Type: Check
Check No:
Check Date:
Check Amount:
Payment Allocation
Invoice # Invoiced Date Client File No. Borrower Address Balance Amount
0000022 Smith 209 NW 21st St $150.00 $0.00
0000009 7321 NW 21st St $400.00 $0.00
0000019 Leeman 1938 Briardiff $375.00 $0.00
0000021 9/3/2005 Sanderson 1932 N Rolling Rdg $830.00 $0.00
Totals: $1,755.00 $0.00
Apply Payments
Close

Hint: Each time you mark an invoice, the amount paid is filled out automatically as long as the amount of the check exceeds the total of the marked invoices.

5. Click **Apply Payments**.

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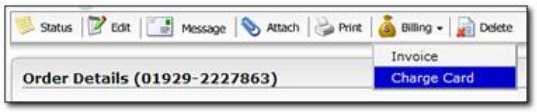
Charging Credit Cards for Orders

If you want to charge a credit card for an appraisal order you've completed on your XSite you need to enable the credit card processing tools on your XSite first. Then, to charge a credit card for an order on your XSite:

1. From your XSite's order management, find and double-click the desired order in the list.

2. Above the **Order Details** pane, click the **Billing** menu and select **Charge Card**.



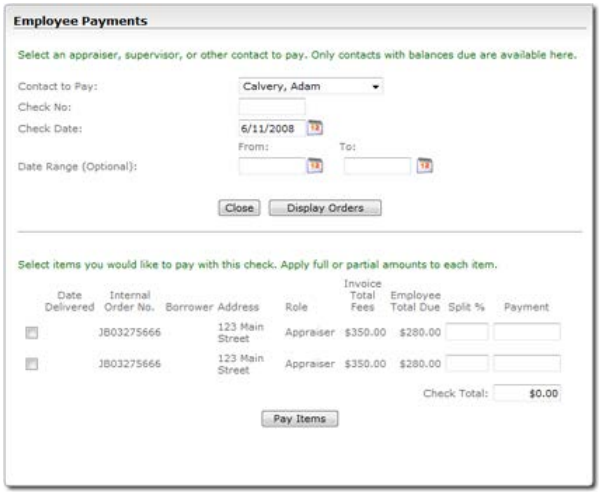
3. Now, simply fill out the client contact and credit card information and click **Charge Credit Card** to process the charge.

Paying Employees

Using the tools built into your XSite you can easily record payments you've made to employees for the appraisal work they've completed.

Note: This tool only records the payment to your employees and does not actually transmit any money to their bank accounts.

1. From your XSite's invoice manager, click **Pay Employees** just below the **Navigation** pane on the left.



Note: This same option is available in the **Accounting** section as well.

2. Enter the check number and date.

3. Select the employee from the drop-down list. Only employees you have included at the bottom of an invoice form with an amount due will show in this list.

4. Enter a date range for the orders you want to see.

5. Click **Display Orders** and a list of orders for that appraiser should display.

6. Mark the orders for which you want to log the appraiser as paid and the amount they were paid for each one.

7. Finally, click **Pay Items** to mark them as paid.

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Accounting

An alternative view into your finances is available through the **Accounting** area of Business Management. To use it:

1. Click **Accounting** in the **Navigation** pane on the left side of Business Management. Here, in one list, you can see cash flow — both debits and credits — for a given date range and/or for a client specific filter.
   - To filter the list to just debits or credits, mark the **Debits Only** or **Credits Only** boxes on the left.
   - To filter the list of activities to just credits from specific clients, choose the client from the **Bill To/Client** menu on the left.
   - To limit the list of debits and credits to a certain range of dates, choose the beginning and ending date using the calendars on the left and then click **Submit**.
2. Now, review the list of debits and credits for the account history you need.
   - Click a column header to sort the list of payment activities by that column.
   - Select any item in the accounting list and click View Invoice or just double-click the line item to view the invoice behind the line item.
   - Click the links within the listing for any item for further information about the debits or credits.
   - To view or edit the invoice for any accounting item, click the **Description** link for any listing.
   - To record new payments from clients or to employees click the **Enter Client Payments** or **Pay Employees** buttons in the toolbar respectively.

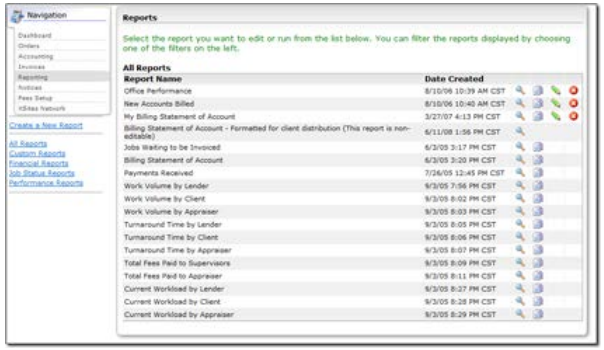
Reporting

The reports in your XSite's Business Management tools offer unlimited customization and like all XSite features can be run from anywhere.

Running Reports

To run a report that's already been created:

1. In Business Management, click **Reports** in the **Navigation** pane.



2. Click any of the links beneath the **Navigation** pane to filter the list of reports that appear.

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3.Finally, click **Run** to the right of the report you wish to launch. The report compiles and you're presented with an Adobe Acrobat version of the results.

Creating Custom Reports (Enterprise Level XSites Only)

Creating custom reports is a simple process involving three steps:

Step 1: Select the fields you want to display in your report

Step 2: Choose a "filter" to select the data you want to include

Step 3: Indicate how the data is to be sorted and grouped

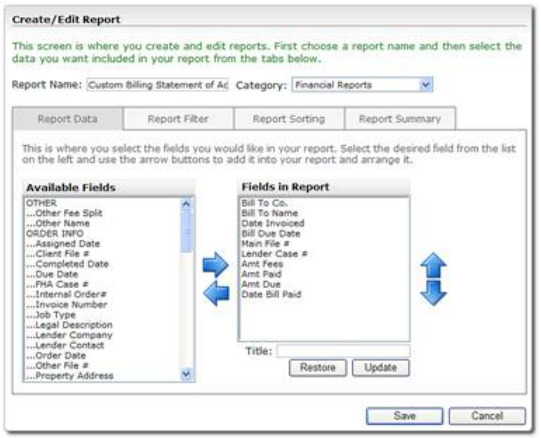
Step 4: Indicate if and how the report should be summarized and sub-totaled.

To create a custom report:

1.In Business Management, click **Reports** in the **Navigation** pane on the left.

2.Now, click **Create a New Report**. Or, if you prefer, you can click **Copy** to the right of an existing report to use that as a starting point. To edit an existing report, click **Edit**.

3.In the **Report Data** tab, use the arrows in the center of the screen to add any of the available fields on the left to your report.



4.When you're finished adding fields, use the up and down arrows to arrange the sequence of the fields.

5.Click the **Report Filter** tab. This is where you limit the data included in your results.

6.Click the link to **Add a new filter.** As an example, you might want to limit your report to the current month's invoices. To do so, you'd choose **Date Invoiced** from the drop-down box, and choose **Between** in the adjacent drop-down. Then, you would pick the first and last dates of the current month from the final boxes. Click **Save** to add your new filter to the report. You can filter by multiple criteria, so you can even have a report customized for dates and a single client.

7.If you'd prefer to have your report prompt you for information each time you run it, click the **Prompt** options that appear. In our example, clicking these options would cause the report to prompt you for the invoice date range each time you run the report.

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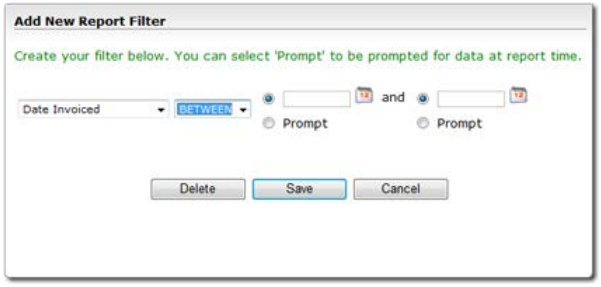
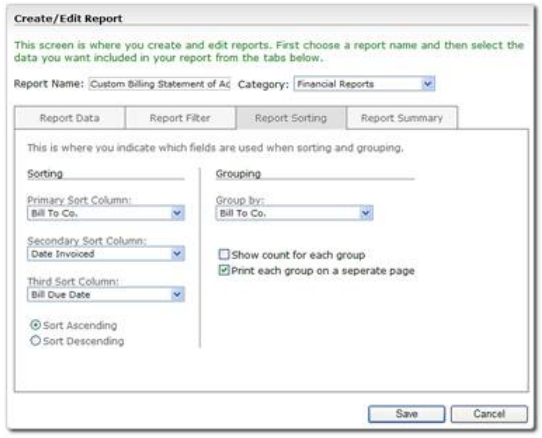


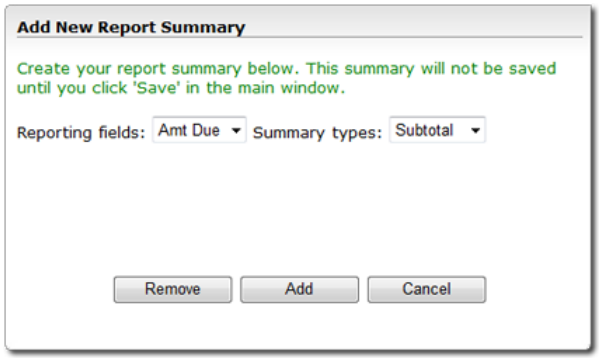
8. Click the **Report Sorting** tab to continue building your report. Here, you can sort the output by choosing the items from the primary and secondary sort columns. For example, you might want to use the client's company name as the primary sort item and then the client's name as the secondary item so you can group together orders from different loan officers at the same company.



9. Choose the field by which you wish to group the output. Using the above example, you'd group by the company name.

10. If you wish to count the report's invoices by group or print each group to a separate page, indicate so by marking the corresponding boxes.

11. Finally, click the **Report Summary** tab and choose how you want to summarize the data by clicking **Add a new summary**. Generally, you'd choose a field and choose **Subtotal**, but there might be times when you want to average values or get a count. In the **Summary types** field, choose the type of summary you'd like to use and remember to select a field you want used in the summary from the **Reporting fields** drop-down.



12. Click **Add** to save your report summary and then check the box in the **Report Summary** tab to include it in your report.

13. Finally click **Save** to save your report.

The report you created is now listed with your other reports.

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Use WinTOTAL Billing

WinTOTAL's Aurora generation includes all the tools you need to create orders, invoice clients and record payments. If you have an Appraiser XSite, those same billing tools have been extended to keep your XSite up to date without requiring you to even log in! The workflow that best suits your office may include various pieces from the full spectrum of features available. This section of the user guide follows the general workflow during the life of an appraisal from order to payment with specific steps to help you perform each step.

Work with Orders

WinTOTAL's Order Management tools exist in two places to help meet your workflow.

- If you prefer to do your order management as you work on your appraisal report, you can update your order with the **Order** PowerView.
- If you prefer to do your order management across groups of orders without having to open each order, you can do so in the Appraisal Desktop.

Order PowerView

Using the Order PowerView's order management tools, you can:

- Update the order by changing the information in the order form.
- Check the Extended Billing option on the left to manage your invoice information through the order form.
- Update the internal status of the order using the **Status** pane on the left.
- Check the XSite Integration box if it hasn't already been checked to ensure that this order syncs with your XSite.

Appraisal Desktop

Using the Appraisal Desktop's order management tools, you can:

- Sort the order list by clicking a column heading.
- View your orders based on their status by clicking a status item from the **Tracking** pane on the left side of the screen.
- Update the internal status of the order by clicking **Add Internal Status** at the top of the screen and selecting a status from the list that appears.
- View or edit the order form by clicking the **Order Form** tab at the bottom of the screen.

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Create Orders

To create a new order in WinTOTAL…

1. Click **New** in the Appraisal Desktop or choose **File**, **New** from the menus at the top. You're immediately taken to the Order PowerView which replaces the "Requester" found in previous versions of WinTOTAL. It ties directly into both your WinTOTAL invoice form and your XSite's accounting data. Of course, if your client places orders on your XSite, the **Order** PowerView's options and the data within the form are already filled out for you. On the other hand, if your clients still prefer to fax you an order, you can simply create an order for them on your XSite by starting a new report in WinTOTAL as usual.

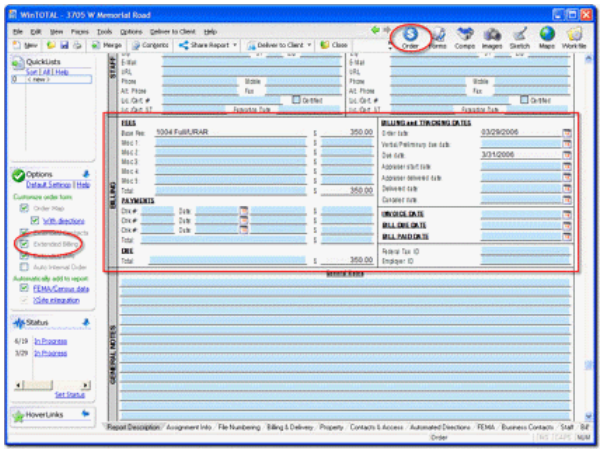
2. Mark the following options in the Options pane along the left side of the screen.

   - **XSite Integration** – If you have an XSite, mark this option to tell WinTOTAL to keep the order and its contacts synchronized between WinTOTAL and your XSite. You can manually synchronize at any time by clicking **Sync with XSite** from the **Order** PowerView or using the Appraisal Desktop's **Sync** tool. For more on setting up XSite integration, see the Integrate with XSites section of this user guide.

   - **Extended Billing -** This enables extra fields at the bottom of your order page for line item fees, payments and a due date. This information transfers to WinTOTAL's automatic invoice forms and to your XSite.

Hint: With XSite billing, you may find that you don't even need an invoice in your report. You can send an invoice straight from your XSite.

For a quick example of the integration in action, create a new order in WinTOTAL and mark the option to integrate it with your XSite. All you need to enter is a client contact, a valid address and an invoice amount. Then, after closing the order, log into your XSite and you should see that the order has indeed transferred.



Of course, you're not required to have an XSite to use WinTOTAL's invoicing features. You can still manually insert your invoice from WinTOTAL's Contents view – or using the SmartMerge or Clone tools. Plus, you can always register any necessary payments by editing the invoice inside WinTOTAL or editing the report's order form. The XSite Integration tools in WinTOTAL simply improve upon the synchronization between the two products. Moreover, since

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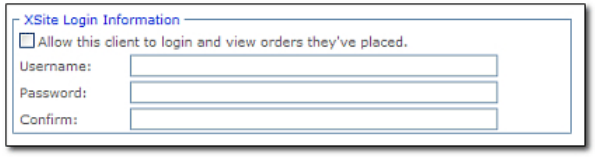
an XSite comes equipped with more advanced billing and reporting tools, if you need to do anything beyond the minimum of invoicing and recording of payments, an XSite is the best solution.

Create Client Login Accounts

If you intend to use your XSite to provide customers with status information and report delivery, then each client needs an account on your system. Of course you can go to your XSite and create accounts for them there, or customers can create their own accounts while visiting your site. But if you receive an order from a new customer, you can also create an account for them on-the-fly while you fill out order. To do so…

1. In the Order PowerView, fill out any necessary contact information in the Lender and/or Client fields of the **Order** PowerView and then click the yellow book icon beside either the **Lender** or **Client** field.
2. From the short menu that appears, choose **Add** to create a new contact or choose **Edit** if you're simply updating an existing contact.
3. When the **Contact Details** screen appears, scroll down to the **XSite Login Information** section if you're editing an individual contact. If you're editing a company contact, simply double-click the individual contact you wish to create a login account for using the list at the bottom and then scroll down to the **XSite Login Information** section.



4. Check the **Allow this client to login** box and then type a **Username** and **Password** for your client to use on your XSite in the boxes provided.
5. When finished, click **OK** to accept your changes and create the client login account.

WinTOTAL immediately connects to the Internet and synchronizes your contact changes with the contacts on your XSite to ensure that you have the same list in both locations.

Update Internal Order Status

Regardless of whether you received an order through your XSite or if you created the order in WinTOTAL and uploaded it to your XSite, you can easily update your order's internal status from directly within WinTOTAL. To do so, you have two options:

- Update the internal status through the Order PowerView
- Update the internal status through the Appraisal Desktop

Ultimately, the option you use to set the internal status on your order simply depends on your preferred workflow. If you intend to update the internal status of an order while you're working on it inside of WinTOTAL, it's probably easier for you to update the order's internal status through the Order PowerView. If you prefer to update the internal status of many separate orders at once without opening each order to update its internal status, it is probably most beneficial for

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you to update the internal status through the Appraisal Desktop.

Payments & Invoicing

The Aurora generation of WinTOTAL comes complete with the same Payment and Invoicing tools found in previous versions of WinTOTAL. In WinTOTAL you can:

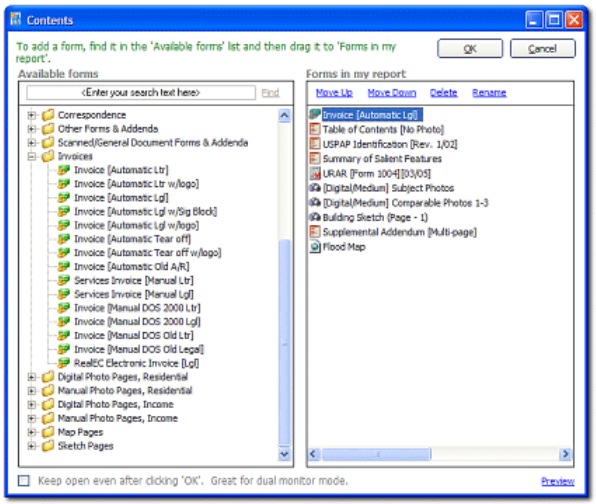
- Create Invoices
- Deliver Invoices
- Log Full Client Payments
- Log Partial Client Payments

Hint: Since you can log all of this information inside of WinTOTAL, you can easily edit the layout of your File Cabinet to show you all of this information at a glance. By doing this, you can see who owes you money, how much, and for what orders without actually opening the report. For more information about how to do this visit our WinTOTAL Tips archive at www.alamode.com/wintotal/tips.

Create Invoices

WinTOTAL includes both automatic and manual invoices to help you bill your clients. **Automatic Invoices** pull information directly from the **Order** PowerView, while **Manual Invoices** allow you to complete all aspects of the invoice yourself. To add an invoice to your report:

1. From either the **Forms** or **Order** PowerView, click **Contents** in the toolbar.
2. In the list of available forms on the left, scroll down to the **Invoices** and double-click the invoice(s) you wish to add to your report.



3. When finished, double-click the invoice you added to your report in the column on the right.
4. Any fees you entered into the **Order** PowerView should automatically propagate into the invoice if you chose one of the **Automatic** forms. From there, you can add any additional fees that you need in the fields provided. If necessary, you can also add any pre-payments

Hint: If you're using the **Extended Billing** option from the **Order** PowerView on your report, you can also add fees or payments through the order form.

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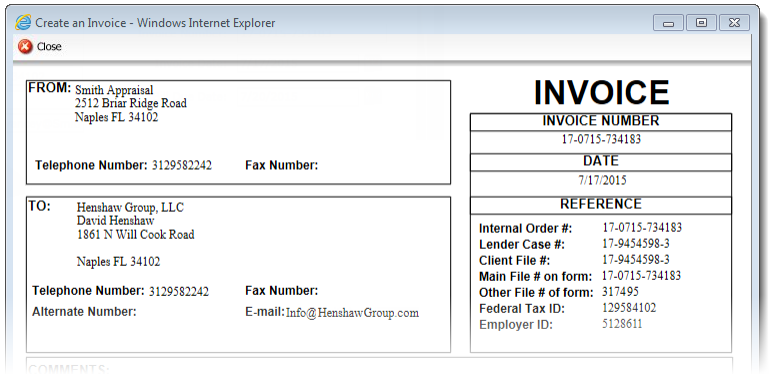
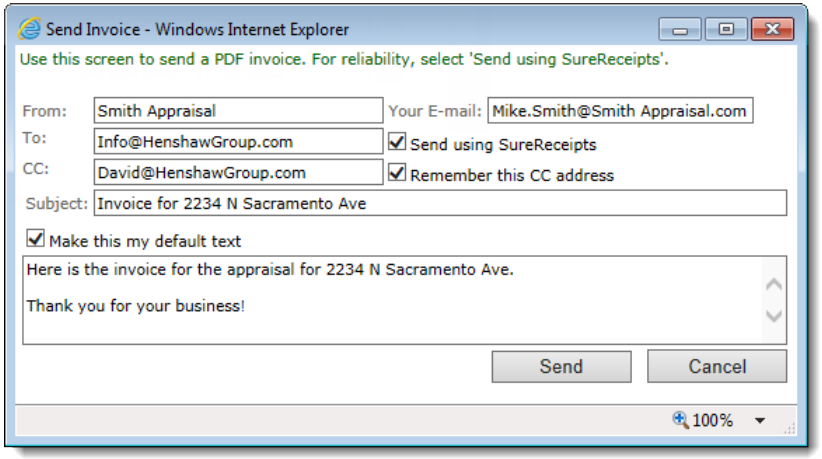
Delivering Invoices

In your XSite's invoice manager, you can save and send an invoice in a few different ways. Just double-click to open any invoice. Then in the invoice editor, choose the appropriate option for your needs. Options include:

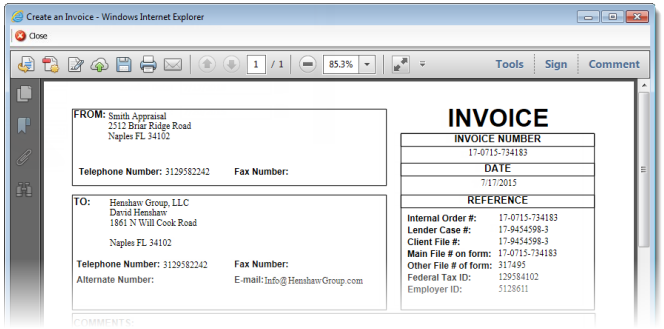
- Click **Save** to save any changes you made to the invoice.
- Click **Close** to close the invoice editor and return to your order.
- Click **Preview** to see how a printed invoice looks. (Click **Close** when in the preview to get back to the invoice.)



- Click **Send** to send a PDF copy of your invoice from your XSite to your client. Then, an on-screen form appears to help you compose an e-mail message to accompany the PDF.


Send Invoice - Windows Internet Explorer
Use this screen to send a PDF invoice. For reliability, select 'Send using SureReceipts'.
From: Smith Appraisal
Your E-mail: Mike.Smith@Smith Appraisal.com
To: Info@HenshawGroup.com
Send using SureReceipts
CC: David@HenshawGroup.com
Remember this CC address
Subject: Invoice for 2234 N Sacramento Ave
Make this my default text
Here is the invoice for the appraisal for 2234 N Sacramento Ave.
Thank you for your business!
Send
Cancel
100%

- Click **PDF** to generate and open a PDF copy of the invoice. From there, you can save it to your computer or send it to your client in an e-mail as you would with any other PDF.



- Click **Add** to create and add a new invoice to this order. When an order has more than one invoice, you can switch between the invoices using the blue arrows on the upper right of the invoice.

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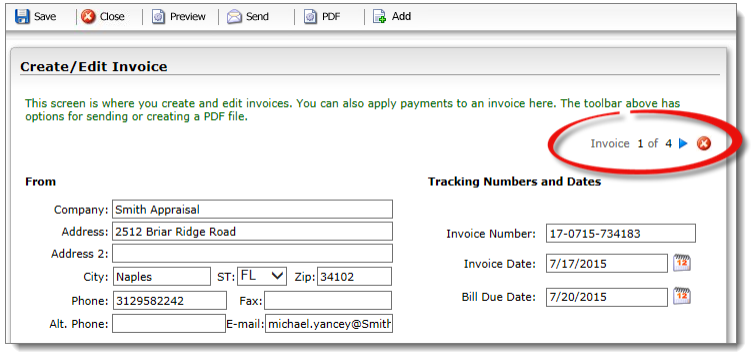

Save
Close
Preview
Send
PDF
Add
Create/Edit Invoice
This screen is where you create and edit invoices. You can also apply payments to an invoice here. The toolbar above has options for sending or creating a PDF file.
Invoice 1 of 4
From
Company: Smith Appraisal
Address: 2512 Briar Ridge Road
Address 2:
City: Naples ST: FL Zip: 34102
Phone: 3129582242 Fax:
Alt. Phone: E-mail: michael.yancey@Smith
Tracking Numbers and Dates
Invoice Number: 17-0715-734183
Invoice Date: 7/17/2015
Bill Due Date: 7/20/2015

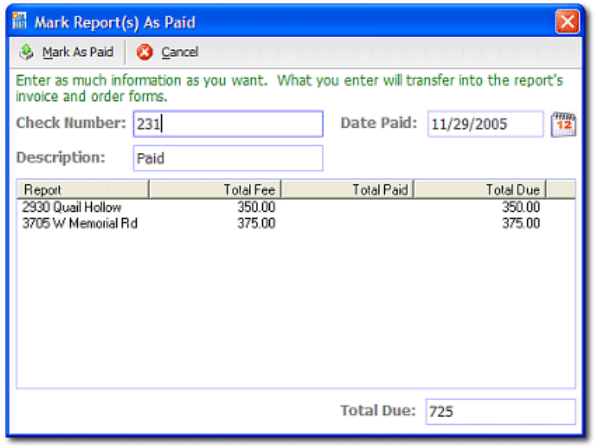
Mark Reports as Paid

Whenever you receive payment for either a single order or a series of orders and wish to log your payments in WinTOTAL you can do so in a variety of different ways. If you've received payment in full, it's typically fastest to simply mark the reports as paid.

1. Open the Appraisal Desktop and select the report(s) you wish to mark as paid in full.

Hint: If you wish to select a series of unrelated orders, just press and hold the **Ctrl** key as you click each of the orders you wish to mark as paid.

2. When finished, right-click your order(s) and choose **Mark as Paid** in the menu that appears.
3. When the **Mark Report(s) as Paid** screen appears, enter the check number and date corresponding with the check you received for your order(s) and then click **Mark as Paid**.


Mark Report(s) As Paid
Mark As Paid
Cancel
Enter as much information as you want. What you enter will transfer into the report's invoice and order forms.
Check Number: 231
Date Paid: 11/29/2005
Description: Paid
Report
Total Fee
Total Paid
Total Due
2930 Quail Hollow 350.00 350.00
3705 W Memorial Rd 375.00 375.00
Total Due: 725

WinTOTAL marks each report in the list as paid in full and connects with your XSite to update the payment information there as well.

Record Partial Client Payments

If you need to log partial payments instead of full payments for an appraisal, you can either do so through the **Order Form** view in the Appraisal Desktop or directly within the order form or invoice of your report. To log a partial payment through the **Order Form** view in the Appraisal Desktop, you must have enabled **Extended Billing** in that order. Otherwise, you must open each order to update the payments.

Note: If the report is signed, the Billing and Status information fields are the only ones you can edit using this method.

To log a payment through the **Report's Order form** view:

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1. Click the **Order Form** tab at the bottom of the Appraisal Desktop.
2. Click the order in your File Cabinet that you wish to update and then click the **Edit** button that appears in the toolbar in the middle of the screen.
3. Scroll down to the **Billing** section of the order form and enter any partial payments in the fields provided.

> **Note**: This section does not appear in the order form unless you have selected the **Extended Billing** option in the report's **Order** PowerView.

4. When finished, click **Save**.

Even if the report is signed, the payment is added to your invoice and WinTOTAL synchronizes with your XSite to ensure that the payment is logged there as well. Alternatively, you can always open the report and manually type in the payments from the invoice or from the **Order** PowerView inside the report, but it's typically faster to update the payments through the Appraisal Desktop.

QuickBooks Integration

While WinTOTAL and XSites provide a robust set of business management and accounting tools, some appraisers may find that their businesses are better served by using a professional accounting package, such as Intuit's QuickBooks application. Fortunately, WinTOTAL includes direct integration with QuickBooks to share billing and payment information.

QuickBooks System Requirements

WinTOTAL's new QuickBooks integrations tools use Intuit's own proprietary integration backend for programs like WinTOTAL. To use their tools, Intuit requires the Pro version (or better) of QuickBooks 2002 or newer and therefore, WinTOTAL's QuickBooks integration tools have the same requirements.

> **Note**: Intuit does not support QuickBooks versions prior to 2007 on Windows Vista. If you intend to run Windows Vista as your operating system, you must upgrade to QuickBooks 2007 or later to leverage WinTOTAL's integration with QuickBooks. For more information on this issue, visit Intuit's Vista support page

Set Up QuickBooks Integration

To take advantage of our improved QuickBooks integration, you first need to install the proper integration software on your computer.

1. Right-click any report in the File Cabinet and choose the **Add report to QuickBooks** option in the menu that appears. Once the progress bar disappears, the necessary software in installed.
2. When a window appears prompting you to permit WinTOTAL to access QuickBooks, open QuickBooks and then open your company file.
3. Once your company file is open, QuickBooks should immediately prompt you about allowing WinTOTAL to access its information. Mark the option to always allow this connection even if QuickBooks is not running and click **Continue**.

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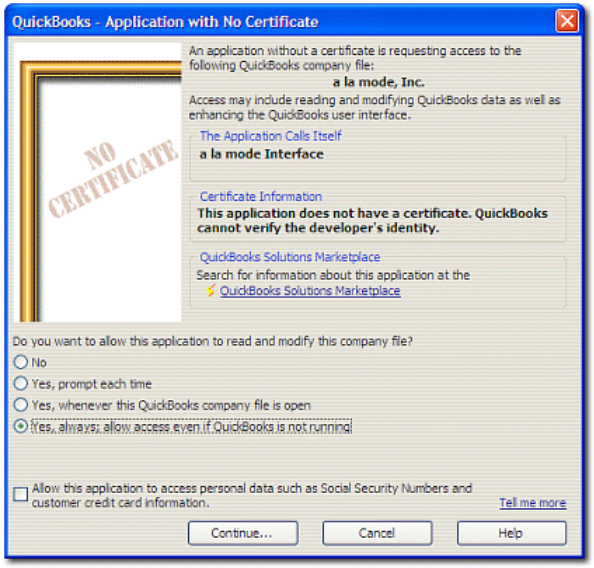

QuickBooks - Application with No Certificate
An application without a certificate is requesting access to the following QuickBooks company file:
a la mode, Inc.
Access may include reading and modifying QuickBooks data as well as enhancing the QuickBooks user interface.
NO CERTIFICATE
The Application Calls Itself
a la mode Interface
Certificate Information
This application does not have a certificate. QuickBooks cannot verify the developer's identity.
QuickBooks Solutions Marketplace
Search for information about this application at the
QuickBooks Solutions Marketplace
Do you want to allow this application to read and modify this company file?
No
Yes, prompt each time
Yes, whenever this QuickBooks company file is open
Yes, always; allow access even if QuickBooks is not running
Allow this application to access personal data such as Social Security Numbers and customer credit card information.
Tell me more
Continue...
Cancel
Help

4. When QuickBooks prompts you to confirm this permission, click **Yes**. Then click **Done** on the second confirmation.

5. Close QuickBooks and return to the WinTOTAL screen prompting you to connect with QuickBooks and click **Connect**.

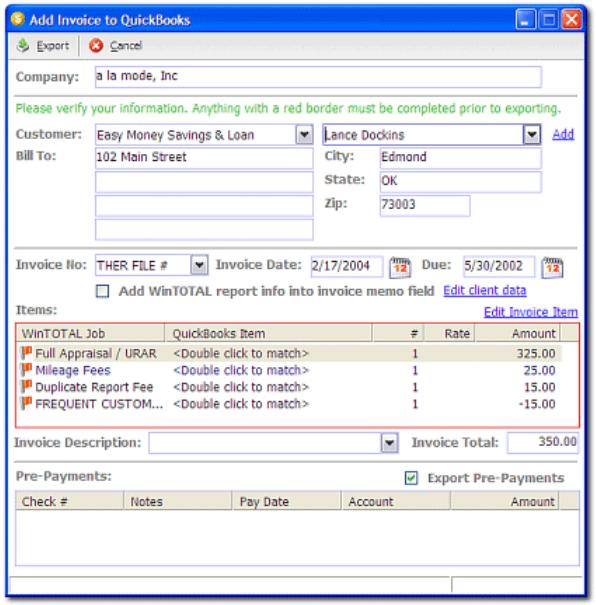
Once you click **Connect**, the integration tools are fully functional.

Export Reports to QuickBooks

Once you've installed the QuickBooks integration tools, you can easily export your reports to QuickBooks.

1. Find the report you want to export in your File Cabinet, right-click it and choose **Add report to QuickBooks** at the bottom of the list.

2. When the **Add Invoice to QuickBooks** window appears, the relevant billing information from your report already appears in the form. To export this report to QuickBooks without creating redundant information in QuickBooks, you need to match the data from your report to the data inside of QuickBooks. First, choose the corresponding QuickBooks customer from the drop-down menu to the far right of the **Customer** field.



3. If you need to add a job type or a new customer to QuickBooks so that you can associate it in WinTOTAL, click **Add** to the right of the customer drop-down menu. Then when the **Add Customer/Job** screen appears, fill out the customer or job type information in the fields provided and click the respective **Add** button at the bottom.

4. Continue filling out the form with the data you want to export to QuickBooks. If you want to include other WinTOTAL report info in the report that's exported to

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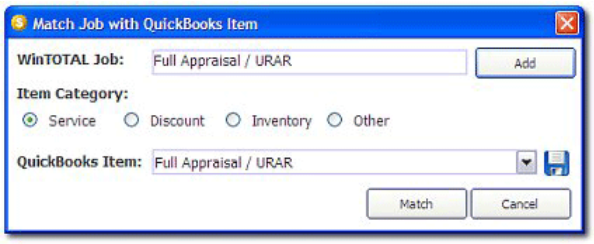
QuickBooks, check the **Add WinTOTAL report info** box and then click **Edit client data** to select the report info you want to export. Once you've selected the data you want, remember to click **OK**.

5. Next, you need to associate the WinTOTAL invoice items with the invoice items you have in QuickBooks. Double-click each item to match it with the associated **QuickBooks Item**.



6. When the **Match Job with QuickBooks Item** screen appears, choose the **Items Category** that fits your needs and then either:

   - Choose the corresponding **QuickBooks Item** from the available drop-down menu.
     - OR -
   - Add a QuickBooks Item by clicking **Add** and filling out the necessary QuickBooks Item information.

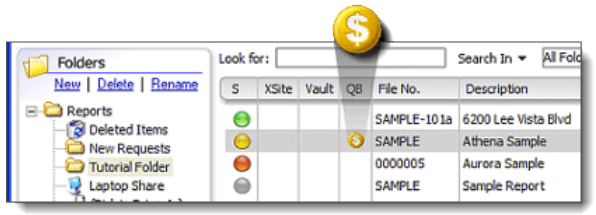
7. Click **Match** to associate the WinTOTAL job with a specific QuickBooks invoice item this one time or click the disk icon and then click **Match,** to match the two items automatically in the future.

8. Finally, once you've returned to the main **Add Invoice to QuickBooks** screen, fill out the remaining info, check the **Export Pre-Payments** box if you want pre-payments you've recorded in WinTOTAL Exported to QuickBooks as well, and then click **Export** to finish.

You can now find your report's invoice information in QuickBooks.

Track Exported Reports

If you're a regular QuickBooks user, you may need an indication about which reports you've exported to QuickBooks and which reports you have not. To simplify this process, the QuickBooks or **QB** column in the File Cabinet depicts a circular money icon if the report has been exported to QuickBooks. If the column is empty, you have not exported it to QuickBooks.



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